Documentation

OpenScape Office, myPortal for HiPath OpenOffice ME and HiPath 3000 V8 and higher

User Guide

A31003-P1000-U102-7-7619

Communication for the open minded

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Contents

1 Introduction . . . 7
1.1 myPortal . . . 7
1.2 Types of Topics . . . 7
1.3 Display Conventions . . . 8
1.4 User Interface Elements . . . 9

2 Installing and Starting myPortal . . . 11
2.1 Prerequisites for myPortal . . . 11
2.2 How to Install myPortal . . . 12
2.3 How to Start myPortal . . . 12
2.4 How to Uninstall myPortal . . . 13

3 First Steps . . . 14
3.1 How to Change your Password . . . 15
3.2 How to Select the Language of the User Interface . . . 16
3.3 How to Select the Language of the Voicemail Box . . . 16
3.4 How to Record your Name Announcement . . . 16
3.5 How to Record your Personal Greeting . . . 17
3.6 How to Specify an E-Mail Address . . . 18
3.7 How to Create a Favorites List . . . 18
3.8 How to Enable the Import of Outlook Contacts at Startup . . . 19

4 Making Calls . . . 20
4.1 Call Number Formats . . . 20
4.2 Call Functions . . . 21
4.2.1 How to Answer a Call . . . 21
4.2.2 How to Pick up a Call for Another Subscriber . . . 21
4.2.3 How to Dial a Number . . . 22
4.2.4 How to Make a Call from the Directory . . . 22
4.2.5 How to Make a Call from the Favorites List . . . 22
4.2.6 How to Make a Call from the Journal . . . 23
4.3 Directories . . . 23
4.3.1 How to Search in Directories . . . 25
4.3.2 How to Sort a Directory . . . 26
4.3.3 How to Zoom in on an Entry . . . 26
4.3.4 How to Add a Personal Contact . . . 27
4.3.5 How to Edit a Personal Contact . . . 27
4.3.6 How to Delete a Personal Contact . . . 27
4.3.7 How to Enable or Disable the Import of Outlook Contacts at Startup . . . 28
4.4 Favorites List . . . 28
4.4.1 How to Add a Group to the Favorites List . . . 29
4.4.2 How to Rename a Group in the Favorites List . . . 30
4.4.3 How to Delete a Group from the Favorites List . . . 30
4.4.4 How to add a Contact to the Favorites List . . . 30
4.4.5 How to Delete a Contact from the Favorites List . . . 31
4.4.6 How to Specify a Default Number for a Favorite . . . 31
4.4.7 How to Change the Width of the Favorites List . . . 31
4.5 Journal . . . 32
4.5.1 How to Group Journal Entries . . . 33

4.5.2 How to Sort the Journal . . . 34

5 Screen Pops . . . 35
5.1 How to Enable or Disable Screen Pops on Inbound Calls . . . 36
5.2 How to Enable or Disable the Opening of Personal Contacts on Inbound Calls . . . 37
5.3 How to Enable or Disable Screen Pops on Outbound Calls . . . 37
5.4 How to Enable Screen Pops for New Voicemails and Fax Messages . . . 37

6 Functions During a Call . . . 39
6.1 How to Configure the Transfer Method . . . 39
6.2 How to Transfer a Call . . . 40
6.3 How to End a Call . . . 40
6.4 How to Record a Call or a Conference . . . 40
6.5 How to End a Call . . . 41

7 Controlling Availability . . . 42
7.1 How to Forward a Call to your Voicemail Box . . . 42
7.2 Presence status . . . 43
7.2.1 How to Change the Presence Status Office or CallMe to Absent . . . 46
7.2.2 How to Change the Presence Status to Office . . . 47
7.2.3 How to Enable or Disable Automatic Resetting of the Presence Status . . . 47
7.2.4 How to Change the Visibility of your Presence Status for Others . . . 47
7.2.5 How to Enable or Disable Automatic Updating of the Presence Status via Outlook Appointments . . . 48
7.2.6 How to Enable or Disable the Automatic Creation of Outlook Appointments when Absent . . . 49
7.2.7 How to Enable or Disable Screen Pops on Changing the Presence Status . . . 49
7.2.8 How to Enable or Disable Screen Pops on Changing the Presence Status to Office . . . 50
7.3 CallMe service . . . 50
7.3.1 How to Enable the CallMe Service . . . 51
7.4 Status-based Call Forwarding . . . 51
7.4.1 How to Configure Status-based Call Forwarding . . . 52
7.5 Rule-Based Call Forwarding . . . 52
7.5.1 How to Add a Call Forwarding Rule . . . 53
7.5.2 How to Edit a Call Forwarding Rule . . . 54
7.5.3 How to Copy a Call Forwarding Rule . . . 56
7.5.4 How to Rename a Call Forwarding Rule . . . 56
7.5.5 How to Remove a Call Forwarding Rule . . . 56
7.5.6 How to Change the Order of Call Forwarding Rules . . . 57
7.6 Personal AutoAttendant . . . 57
7.6.1 How to Edit a Profile for the AutoAttendant . . . 60

8 Conferencing (only HiPath OpenOffice ME) . . . 61
8.1 Ad-hoc conference . . . 64
8.1.1 How to Configure and Initiate an Ad-hoc Conference . . . 64
8.1.2 How to View an Ad-hoc Conference as a Conference Controller . . . 65
8.1.3 How to Add Conference Participants . . . 65
8.1.4 How to Disconnect a Conference Participant . . . 66
8.1.5 How to Reconnect Conference Participants . . . 67
8.1.6 How to Remove Conference Participants . . . 67
8.1.7 How to Specify Another Conference Controller . . . 67
8.1.8 How to End an Ad-hoc or Scheduled Conference . . . 68
8.1.9 How to Repeat an Ad-hoc Conference . . . 68
8.2 Scheduled Conference . . . 69
8.2.1 How to Configure a Scheduled Conference . . . 71
8.2.2 How to Display a Scheduled Conference as the Conference Controller . . . 72

8.2.3 How to Determine the Dial-in Number for a Scheduled or Permanent Conference . . . 73
8.2.4 How To Determine the PIN for a Scheduled or Permanent Conference . . . 73
8.2.5 How to Change the Password for a Scheduled or Permanent Conference . . . 74
8.2.6 How To Display a Scheduled or Permanent Conference as the Conference Controller . . . 74
8.2.7 How to Extend a Scheduled Conference . . . 75
8.2.8 How to Delete a Scheduled Conference . . . 75
8.3 Permanent Conference . . . 75
8.3.1 How to Configure a Permanent Conference . . . 77
8.3.2 How to Display a Permanent Conference as the Conference Controller . . . 77
8.3.3 How to Delete a Permanent Conference . . . 78

9 Instant Messaging . . . 79
9.1 How to Send an Instant Message . . . 79

10 Voice Messages and Fax . . . 80
10.1 Voicemail . . . 80
10.1.1 How to Determine the Call Number for your Voicemail Box . . . 83
10.1.2 How to Select Recording or Announcement Mode . . . 84
10.1.3 How to Record an Announcement . . . 84
10.1.4 How to Import an Announcement . . . 85
10.1.5 How to Enable or Disable the Announcement of your Presence Status for External Callers . . . 85
10.1.6 How to Enable or Disable the Announcement of your Presence Status for Specific Callers . . . 86
10.1.7 How to Grant or Deny the Attendant Permission to Retrieve Voicemail and Fax Messages . . . 87
10.1.8 How to Activate or Deactivate the Password Prompt for the Voicemail Box . . . 87
10.1.9 How to Select the Language of the Voicemail Box . . . 88
10.2 Managing Voicemail . . . 88
10.2.1 How to Listen to a Voice Message on the Phone . . . 90
10.2.2 How to Listen to a Voice Message on the PC . . . 90
10.2.3 How to Call the Sender of a Voice Message . . . 91
10.2.4 How to Forward a Voicemail Message . . . 91
10.2.5 How to Move a Voice Message . . . 91
10.2.6 How to Save a Voice Message as a WAV File . . . 92
10.2.7 How to Sort Voice Messages . . . 92
10.2.8 How to Delete a Voice Message . . . 92
10.3 Fax Box . . . 93
10.3.1 How to Determine your own Fax Number . . . 93
10.4 Managing Fax Messages . . . 94
10.4.1 How to Display a Fax Message . . . 95
10.4.2 How to Call the Sender of a Fax Message . . . 95
10.4.3 How to Forward a Fax Message . . . 96
10.4.4 How to Move a Fax Message . . . 96
10.4.5 How to Save a Fax Message as a TIFF File . . . 96
10.4.6 How to Sort Fax Messages . . . 97
10.4.7 How to Display Fax Messages in the Send Queue . . . 97
10.4.8 How to Display Sent Fax Messages . . . 97
10.4.9 How to Delete a Fax Message . . . 98
10.5 Sending Fax Messages . . . 98
10.6 Notification Service for Messages . . . 99
10.6.1 How to Enable or Disable E-mail Notifications . . . 99
10.6.2 How to Enable or Disable the Notification by Phone . . . 100
10.6.3 How to Enable or Disable SMS Notification . . . 101
10.7 Phone Menu of the Voicemail Box . . . 101

11 Configuration 103
11.1 How to Edit your own Name 104
11.2 How to Specify an E-Mail Address 104
11.3 How to Define an Additional Phone Number 104
11.4 How to Provide your own Picture 105
11.5 How to Delete your own Picture 105
11.6 Programming the Function Keys of the Telephone 105
11.6.1 How to Program the Function Keys of the Telephone 106
11.7 How to Change the Password 107
11.8 How to Enable or Disable an Automatic Logon 108
11.9 How to Select the Language of the User Interface 108
11.10 How to Change Skin Colors 108
11.11 How to Change the Server Address 109
11.12 Automatic Updates 109
11.12.1 How to Perform Automatic Updates 110
11.13 Troubleshooting 110
11.13.1 Problem Resolution: No Connection to the Communication System 110
11.13.2 Problem Resolution: The Nokia Application Suite Starts Instead of myPortal 111
11.13.3 Problem Resolution: Empty Browser Window for Key Programming 111
11.13.4 Problem Resolution: No Automatic Update 111

Index 112

1 Introduction

This document is intended for the users of myPortal and describes its installation, configuration and operation.

Related Topics

- myPortal
- Types of Topics
- Display Conventions
- User Interface Elements

1.1 myPortal

myPortal is an application for unified communications. Besides convenient dialing aids via phone directories and favorites and information on the presence status of other subscribers, myPortal can, for example, also be used to access voicemails and Fax messages.

myPortal provides the following features:

- Directories
- Favorites List
- Journal
- Screen Pops (also called pop-up windows)
- Presence status
- CallMe service
- Status-based call forwarding
- Personal AutoAttendant
- Conferencing (only HiPath OpenOffice ME)
- Record calls
- Record conferences (only HiPath OpenOffice ME)
- Instant Messaging
- Voice and Fax messages

Related Topics

- Introduction

1.2 Types of Topics

The types of topics include concepts and operating instructions.

Type of topic	Contents	Caption
Concept	Explains the "What".	Usually without a verb, e.g.: *Call Functions*.
Operating instructions	Describe task-oriented application cases – i.e., the "How" – and assumes familiarity with the associated concepts.	Starts with "How to" followed by a verb, for example: *How to Dial a Call Number*.

Related Topics

- Introduction
- Display Conventions

1.3 Display Conventions

This documentation uses a variety of methods to present different types of information.

Purpose	Presentation	Example
User Interface Elements	Bold	Click **OK**.
Menu sequence	>	**File > Exit**
Special emphasis	Bold	**Do not delete** Name.
Cross-reference text	Italics	You will find more information in the topic*Network*.
Output	Monospace font, e.g., Courier	`Command not found.`
Input	Monospace font, e.g., Courier	`Enter` LOCAL as the file name.
Key combination	Monospace font, e.g., Courier	`<Ctrl>+<Alt>+<Esc>`
Work Steps and Substeps	Numbered and alphabetical lists	1. Configure the DSL telephony stations with the associated DID phone numbers. a) Click **Add**. b) Enter the name of the Internet telephony station under **Internet Telephony Station**.
Alternative Work Steps	Enumeration	• If you want to output amounts, enable the check box **Display amounts instead of units**. • If you want to output units, clear the check box **Display amounts instead of units**.

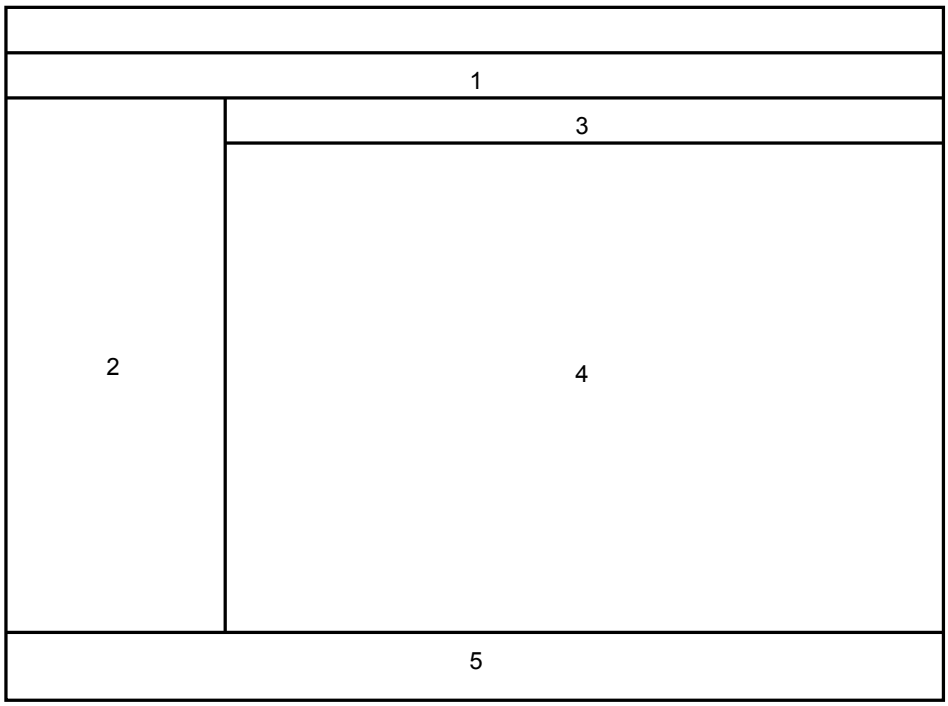
Related Topics

- Introduction
- Types of Topics

1.4 User Interface Elements

The user interface of myPortal consists of the main window and various screen pops, depending on the situation.

The Main Window consists of the following elements:



- Menu bar (1) with:
  - Drop-down list for call numbers with the **Dial** button (**Answer** during an incoming call or **Hang Up** during an ongoing call).
    The drop-down list contains already dialed numbers and is an input field for call numbers.
  - **Conference** menu
  - **Setup** menu
    If the **myPortal Setup** window does not show all tabs, you can scroll horizontally or vertically within it with the two triangular symbols.
  - **Help** menu
  - Drop-down list for Presence status
  - Name of the logged in user
- Favorites list (2)
- Tabs (3):
  - **Journal**
  - **Voice messages**
  - **Fax Messages**
  - **Directories**

- Workspace (4):
  The information and actions available in the workspace depend on the selected tab.
- Status bar (5) with:
  - Status of myPortal, e.g., **Connected**
  - Date and Time
  - Version information on the communication system, myPortal and Java

Context menus

Context menus provide situation-based actions for selection. Context menus can be opened by clicking on the relevant object with the second (usually the right) mouse button.

Related Topics

- Introduction
- Favorites List
- How to Change the Width of the Favorites List
- How to Dial a Number
- Screen Pops
- Conferencing (only HiPath OpenOffice ME)
- Presence status
- Journal
- Directories
- Managing Voicemail
- Managing Fax Messages
- How to Select the Language of the User Interface
- How to Change Skin Colors

2 Installing and Starting myPortal

The installation of myPortal is subject to specific hardware and software requirements.

myPortal myPortal supports operation with multiple Windows user accounts on shared PCs. The individual settings of all users are retained.

Related Topics

- Prerequisites for myPortal
- How to Install myPortal
- How to Start myPortal
- How to Uninstall myPortal

2.1 Prerequisites for myPortal

In order to use myPortal, the client PC of the subscriber must be equipped with the appropriate hardware and software configurations. The available functionality depends on the communication system being used and, for HiPath OpenOffice ME, also on the licenses being used.

myPortal can only be used in combination with the following system telephones (HFA): OpenStage, optiPoint 410 and optiPoint 420.

Minimum Requirements for client PCs:

- Supported operating systems:
  - Windows XP (SP2) (32 bit)
  - Windows 2003 (32 bit)
  - Windows Vista (32 bit)
- Supported Web browser: (for programming the function keys of the telephone):
  - Microsoft Internet Explorer Version 6 (Windows XP and Windows 2003)
  - Microsoft Internet Explorer Version 7 (Windows XP, Windows 2003 and Vista)
  - Mozilla Firefox Version 3 (Windows XP, Windows 2003, Windows Vista and Linux)
- Additional Software
  - Java 1.6
- Hardware
  - 2 GHz CPU
  - 512 MB RAM
  - 100 Mbps LAN
  - SVGA (800x600) screen resolution

Conferencing is only available with HiPath OpenOffice ME and only with the Comfort Plus User license.

The Fax functionality (incoming and outgoing) is likewise only available with HiPath OpenOffice ME and only with the Comfort Plus User license. Fax messages can only be displayed under Windows operating systems.

Related Topics

- Installing and Starting myPortal
- How to Install myPortal

2.2 How to Install myPortal

Prerequisites:

- Your PC meets the requirements described under Prerequisites for myPortal.
- Your Windows user account has local administration rights.
- Your administrator of the communication system has made the installation file available to you.

Step by Step:

1. Perform the installation.
2. If the **User Account Control** window appears with the message `An unidentified program wants access to your computer.`, click on **Allow**.
3. Follow the installation instructions.

Next steps: Start myPortal.

Related Topics

- Installing and Starting myPortal
- Prerequisites for myPortal
- How to Start myPortal
- How to Uninstall myPortal

2.3 How to Start myPortal

Prerequisites:

- myPortal is installed on your PC.

Step by Step:

1. Click **Start > Program Files > Communication Clients > myPortal**.
2. Enter your **User Name** in the Login window. This is usually your call number. If you have any questions about this, please contact the administrator of the communication system.
3. Enter your **password**. The password when logging on for the first time is 1234.

4. If you want to use myPortal with an automatic logon in the future, enable the check box **Save Password**. The Login window will then no longer be displayed. You can change this option at any time.

   NOTICE: Use the automatic login only if you are sure that no one else has access to your Windows user account. Otherwise, unauthorized users could, for example, potentially access your voicemails and fax messages or redirect your station number to external toll-based destinations by simply using the default password.

5. Click **Login**.

Next steps: Change your password after starting myPortal for the first time.

Related Topics

- Installing and Starting myPortal
- How to Install myPortal
- How to Change the Password
- How to Enable or Disable an Automatic Logon
- Problem Resolution: No Connection to the Communication System
- Problem Resolution: The Nokia Application Suite Starts Instead of myPortal

2.4 How to Uninstall myPortal

Step by Step:

1. Close myPortal.
2. Click on **Programs and Features** in the **Control Panel**.
3. Click on **Uninstall** in the context menu of **myPortal**.
4. Click **Continue**.
5. In the **myPortal Uninstall** window, click on **Yes**.
6. If a message about deleting shared user files appears, click on **No to all**.

Related Topics

- Installing and Starting myPortal
- How to Install myPortal

3 First Steps

The First Steps describes the recommended actions to be taken right at the beginning.

Change the password

> ***NOTICE:*** For security reasons, you should change your password after logging in for the first time. Otherwise, unauthorized users could, for example, potentially access your voicemails and fax messages or redirect your station number to external toll-based destinations by simply using the default password.

Select the language settings

Select the user interface language for myPortal and, separately, also the language to be used by the voicemail box to play back the menu and internal system announcements.

Record your name announcement

Your name announcement is used as an independent component of the announcements played back by the communication system:

- when your voicemail box notifies callers about your Presence status
- for conferences where you are the inviter, as a greeting to the participants: "... has invited you to participate in a conference"
- for conferences, to inform participants that you have joined: "... has joined the conference."

Record your personal greeting

Your personal greeting is played back to callers by default when they reach your voicemail box. For example: "I am unfortunately unable to take your call at the moment …". The following announcements are possible as personal greetings:

- general personal greeting
- Personal greeting for **Busy**:
- Personal greeting for **No Answer**:

> ***INFO:*** You can record further announcements; see *Voicemail*.

Specify your e-mail address

Enter your e-mail address so that the communication system can invite you to conferences by e-mail and notify you about new voice and Fax messages.

Create your Favorites list

Your Favorites list will provide you with a constant view of your most important contacts and enable you to call them with one click.

Importing Outlook Contacts in myPortal

You can have your Outlook contacts imported into the personal directory of myPortal automatically on starting myPortal. You can then call them conveniently by using myPortal, for example.

Related Topics

- How to Change your Password
- How to Select the Language of the User Interface
- How to Select the Language of the Voicemail Box
- How to Record your Name Announcement
- How to Record your Personal Greeting
- How to Specify an E-Mail Address
- How to Create a Favorites List
- How to Enable the Import of Outlook Contacts at Startup
- Voicemail

3.1 How to Change your Password

NOTICE: For security reasons, you should change your password after logging in for the first time. Otherwise, unauthorized users could, for example, potentially access your voicemails and fax messages or redirect your station number to external toll-based destinations by simply using the default password.

INFO: You can also change the password via the Phone menu of the voicemail box.

Step by Step:

1. Click **Setup**.
2. Click on the **Personal Details** tab.
3. Click in the **My Personal Details** are under **Password** on **Reset**.
4. Enter your current password in the **Current** field.

5. Enter your new password in the **New** and **Confirm** fields. The password must not consist of only digits.

> ***INFO:*** The password applies to myPortal, myPortal for Outlook and myPortal for Outlook as well as phone access to your voicemail.

6. Click on **OK**, followed by **Save**.

Related Topics

- First Steps

3.2 How to Select the Language of the User Interface

Step by Step:

1. Click **Setup**.
2. Click on the **Program Settings** tab.
3. Choose the **Language** in the **Miscellaneous** area.
4. Click **Save**.

Next steps: Exit myPortal and restart the application.

Related Topics

- First Steps

3.3 How to Select the Language of the Voicemail Box

Step by Step:

1. Click **Setup**.
2. Click on the **Program Settings** tab.
3. Choose the desired language from the **VoiceMail Language** drop-down list in the **Miscellaneous** area.
4. Click **Close**.

Related Topics

- First Steps

3.4 How to Record your Name Announcement

> ***INFO:*** You can also record your name announcement via the Phone menu of the voicemail box.

Step by Step:

1. Click **Setup**.
2. Click on the **Profiles** tab.
3. Click **Record**.
4. Click on **My VoiceMail Name** in the list of announcements.
5. Click **Record**. The voicemail box will now call you on your phone.
6. Answer the call.
7. Speak out your name after the tone.
8. Click **Stop**.
9. If you want to listen to the announcement on the phone, click on **Play**. To exit the playback loop, click on **Stop**.
10. If you want to record the announcement again, click on **Record**.
11. Click on **Close**, followed by **Save**.

Related Topics

- First Steps
- Voicemail
- Phone Menu of the Voicemail Box

3.5 How to Record your Personal Greeting

INFO: You can also record your personal greeting via the Phone menu of the voicemail box.

Step by Step:

1. Click **Setup**.
2. Click on the **Profiles** tab.
3. Click **Record**.
4. Select one of the following options:
   - If you want to record the general personal greeting, click on **My VoiceMail Greeting**.
   - If you want to record the personal greeting for **Busy**, click on **Busy**.
   - If you want to record the personal greeting for **No Answer**, click on **No Answer**.
5. Click **Record**. The voicemail box will now call you on your phone.
6. Answer the call.
7. Speak out your personal greeting after the tone.
8. Click **Stop**.

9. If you want to listen to the announcement on the phone, click on **Play**. To exit the playback loop, click on **Stop**.
10. If you want to record the announcement again, click on **Record**.
11. Click on **Close**, followed by **Save**.

Related Topics

- First Steps
- Voicemail
- Phone Menu of the Voicemail Box

3.6 How to Specify an E-Mail Address

Prerequisites:

- Your administrator of the communication system has configured e-mail forwarding.

Step by Step:

1. Click **Setup**.
2. Click on the **Personal Details** tab.
3. Enter your **E-mail Address** in the **My Contact Details** area.
4. Click **Save**.

Related Topics

- First Steps

3.7 How to Create a Favorites List

Step by Step:

1. Right-click in a free area of the Favorites list to open the context menu and select **New Group**.
2. Enter a **Group Name**.
3. Click **OK**.
4. Click the **Directories** tab.
5. Click on one of the directories: **Internal Directory**, **External Directory** or **Personal Directory**.
6. Drag the desired contact to the group name in the Favorites list.

Related Topics

- First Steps
- Favorites List

3.8 How to Enable the Import of Outlook Contacts at Startup

Step by Step:

1. Click **Setup**.
2. Click on the **Program Settings** tab.
3. Enable the **Import Outlook Contacts on Startup** check box.
4. Click **Save**.

Related Topics

- First Steps

4 Making Calls

You can use myPortal for simple call functions as well as all the convenient functions offered via the directories, the Favorites list and the Journal.

Related Topics

- Call Number Formats
- Call Functions
- Directories
- Favorites List
- Journal

4.1 Call Number Formats

Call numbers can be specified in different formats.

Format	Description	Example
Canonical	Begins with + and always includes the country code, area code and the full remaining station number. Blanks and the special characters + ( ) / - : ; are allowed.	+49 (89) 722-98765
Dialable	Exactly as you would dial the call number on the phone, always without the trunk access code.	• 321 (internal) • 72298765 (own local network) • 08972298765 (external local network) • 00498972298765 (international)

Related Topics

- Making Calls
- How to Dial a Number
- How to Enable the CallMe Service
- How to Add a Call Forwarding Rule
- How to Edit a Call Forwarding Rule
- How to Edit a Profile for the AutoAttendant
- How to Configure and Initiate an Ad-hoc Conference
- How to Configure a Scheduled Conference
- How to Configure a Permanent Conference
- How to Enable or Disable the Notification by Phone
- How to Define an Additional Phone Number

4.2 Call Functions

You can control call functions with myPortal, e.g., answer calls or pick up calls for another subscriber. You can also dial phone numbers directly from the Journal, the Favorites list or a directory. The call functions can be controlled both in screen pops and in the menu bar.

Related Topics

- Making Calls
- How to Answer a Call
- How to Pick up a Call for Another Subscriber
- How to Dial a Number
- How to Make a Call from the Directory
- How to Make a Call from the Favorites List
- How to Make a Call from the Journal
- Screen Pops

4.2.1 How to Answer a Call

Step by Step:

1. Select one of the following options:

- Click in the **Inbound Call** screen pop on **Answer**.
- Click on **Answer** in the menu bar.

Related Topics

- Call Functions
- How to Enable or Disable Screen Pops on Inbound Calls

4.2.2 How to Pick up a Call for Another Subscriber

Step by Step:

1. Select one of the following options:

- Click in the **Favorites** list on the subscriber being called and select **Call Pickup** from the context menu.
- Click under **Directories > Internal Directory** on the subscriber being called and select **Call Pickup** from the context menu.

Related Topics

- Call Functions
- Directories
- Favorites List

4.2.3 How to Dial a Number

Step by Step:

1. Select one of the following options:
   - Enter the phone number in dialable format or in canonical format in the drop-down list for phone numbers in the menu bar and press the `Enter` key.
   - Select a phone number from the drop-down list for phone numbers in the menu bar and press the `Enter` key.

Related Topics

- Call Functions
- User Interface Elements
- Call Number Formats

4.2.4 How to Make a Call from the Directory

Step by Step:

1. Click the **Directories** tab.
2. Click on one of the directories: **Personal Directory**, **External Directory** or **Internal Directory**.
3. Select one of the following options:
   - Double-click in the relevant directory entry on the desired station number.
   - Click in the context menu of the relevant directory entry on the desired station number.

Related Topics

- Call Functions
- Directories

4.2.5 How to Make a Call from the Favorites List

Step by Step:

1. If required, double-click on the triangle on the left of the relevant group to expand the associated entries in the Favorites list.
2. Select one of the following options:
   - Double-click on the relevant station.

- Click in the context menu of the relevant subscriber on the desired station number.

Related Topics

- Call Functions
- Favorites List
- How to Specify a Default Number for a Favorite

4.2.6 How to Make a Call from the Journal

Step by Step:

1. Click on the **Journal** tab.
2. Click on one of the folders: **Open**, **All Calls**, **Missed**, **Answered**, **Internal**, **External**, **Inbound** or **Outbound**.
3. If required, double-click on the triangle on the left of the relevant group to expand the associated Journal entries.
4. Select one of the following options:
   - Double-click on the relevant Journal entry.
   - Click in the context menu of the relevant Journal entry on the desired station number.

Related Topics

- Call Functions
- Journal

4.3 Directories

Directories organize your contacts.

myPortal provides the following directories, which support the following functions:

Symbol	Directory	Make Call	Send Instant Message	Add to Favorites	Add to Conference
	Personal directory: You can use the personal directory to either add, edit and delete your personal contacts individually or to import your Outlook contacts on starting myPortal. If you import the Outlook contacts, you cannot edit them in myPortal.	x	-	x	x
	Internal directory (symbol for system phones in accordance with current Presence status) Contains internal subscribers with their Presence status (only system telephones) and their additional phone numbers. When a subscriber is absent, you can see the scheduled time of return in the **Date / Time** column, provided that subscriber has allowed his or her Presence status to be visible to you.	x	x	x	x
	External offline directory: Contains contacts from an offline corporate directory and must be configured by the administrator of the communication system.	x	-	x	x
	External directory: Contains contacts from the LDAP corporate directory and must be configured by the administrator of the communication system. The entries are always updated whenever you the directory.	x	-	x	x

Contact Details

Depending on the directory involved, the List view of the contacts shows different details from among those listed below: **Extension**, **Date / Time**, **Last Name**, **First Name**, **Mobile Ph.**, **Assistant Ph.**, **External**, **Home Ph. 1**, **Business Ph. 1**, **Business Ph. 2**, **Fax Ph.**, **E-mail**, **Department**, **Site**, **Company**. The width of all columns is variable.

Searching

You can search the directories by **First Name**, **Last Name** or a call number. You can select which directories are to be included in the search. The directories are searched in the order shown in the table above. The search can be conducted using whole words and also with partial search terms such as a part of a station number, for example. The set search options remain in effect for subsequent searches. Al search terms used are saved. You can optionally delete the list of search terms used.

Sorting

You can sort the contacts of a directory by any column in ascending or descending alphanumeric order. The direction in which the triangle at a column header is pointing indicates the ascending or descending order.

Zooming in on an Entry

You can zoom in on a specific entry one character at a time in the column by which the entries are sorted. For example, you could jump to the first Last Name starting with "Sen" one letter at a time. This method can also be used in the results of a search.

Related Topics

- Making Calls
- How to Search in Directories
- How to Sort a Directory
- How to Zoom in on an Entry
- How to Add a Personal Contact
- How to Edit a Personal Contact
- How to Delete a Personal Contact
- How to Enable or Disable the Import of Outlook Contacts at Startup
- User Interface Elements
- How to Pick up a Call for Another Subscriber
- How to Make a Call from the Directory
- How to Enable or Disable the Opening of Personal Contacts on Inbound Calls
- How to Send an Instant Message
- How to add a Contact to the Favorites List
- How to Add Conference Participants
- Favorites List
- Screen Pops
- Presence status
- Configuration

4.3.1 How to Search in Directories

Step by Step:

1. Click the **Directories** tab.
2. Click on **Search** to open the Search mask.
3. Select one of the following Search options:
   - If you want to search for a full word, enable the **Match Full Word** check box.
   - If you want to search for a part of a word, clear the **Match Full Word** check box.
4. Select which directories are to be included in the search by enabling or clearing the **Internal Directory**, **Personal Directory**, **External Directory** and **External Offline Directory** check boxes as required.
5. Enter a search term in the drop-down list and click **Search**. If your search returns a result, myPortal will display a hit list.

6. To abort an ongoing search, click **Stop**.
7. To delete the list of search terms used, click **Clear History**.
8. To return from the hit list to the directory, click on the directory.

Related Topics

- Directories
- How to add a Contact to the Favorites List
- How to Add Conference Participants

4.3.2 How to Sort a Directory

Step by Step:

1. Click on the **Directories** tab.
2. Click on the desired directory, e.g., **Internal Directory**.
3. Click on one of the column titles, e.g., **Last Name**, to sort the contacts by this criterion in ascending alphanumeric order.
4. If you want to reverse the sort order, click again on column header.
5. To jump to the first entry in the sorted column that begins with a specific character, click on any contact in the directory and enter the desired character.

Related Topics

- Directories
- How to Zoom in on an Entry

4.3.3 How to Zoom in on an Entry

Prerequisites:

- The list is sorted by the column containing an item that you want to zoom in on.

Step by Step:

1. Click on any item in the list.
2. Enter the first character of the desired hit.

Related Topics

- Directories
- How to Sort a Directory
- Journal
- How to Sort the Journal

4.3.4 How to Add a Personal Contact

Prerequisites:

- The importing or Outlook contacts at startup is disabled.

Step by Step:

1. Click the **Directories** tab.
2. Click on **Personal Directory**.
3. Click **Add**.
4. Enter the contact data in the **Personal Contact** window.
5. Click **Save**.

Related Topics

- Directories
- How to Edit a Personal Contact
- How to Delete a Personal Contact
- How to Enable or Disable the Import of Outlook Contacts at Startup

4.3.5 How to Edit a Personal Contact

Prerequisites:

- The importing or Outlook contacts at startup is disabled.

Step by Step:

1. Click the **Directories** tab.
2. Click on **Personal Directory**.
3. Click on the relevant personal contact.
4. Click **Edit**.
5. Edit the contact data in the **Personal Contact** window.
6. Click **Save**.

Related Topics

- Directories
- How to Add a Personal Contact
- How to Delete a Personal Contact
- How to Enable or Disable the Import of Outlook Contacts at Startup

4.3.6 How to Delete a Personal Contact

Prerequisites:

- The importing or Outlook contacts at startup is disabled.

Step by Step:

1. Click the **Directories** tab.
2. Click on **Personal Directory**.
3. Select one of the following options:

- Click on the relevant personal contact.
- Mark the relevant personal contacts.

4. Click on **Remove**, followed by **Yes**.

Related Topics

- Directories
- How to Add a Personal Contact
- How to Edit a Personal Contact
- How to Enable or Disable the Import of Outlook Contacts at Startup

4.3.7 How to Enable or Disable the Import of Outlook Contacts at Startup

Step by Step:

1. Click **Setup**.
2. Click on the **Program Settings** tab.
3. Choose one the following options in the **Outlook** area:
   - If you want to enable the importing of Outlook contacts on starting myPortal, select the **Import Outlook Contacts on Startup** check box.
   - If you want to disable the importing of Outlook contacts on starting myPortal, clear the **Import Outlook Contacts on Startup** check box.
4. Click **Save**.

Related Topics

- Directories
- How to Add a Personal Contact
- How to Edit a Personal Contact
- How to Delete a Personal Contact

4.4 Favorites List

The Favorites list provides you with a constant view of selected contacts. These contacts can also be called very easily directly from the Favorites list. Internal subscribers (with system telephones) are shown together with their Presence status and can be contacted via instant messaging.

You can add contacts from all directories to the Favorites list. For favorites that do not come from the internal directory, instead of the symbol for the Presence status, the symbol for the source of the contact is displayed.

The Favorites list manages contacts in groups. The contacts of a group are, in turn, sorted by Last Name.

When an internal subscriber is absent, you can determine the scheduled time of his or her return by positioning the mouse pointer over the entry for that subscriber, provided the subscriber has allowed his or her Presence status to be visible to you.

For favorites with multiple phone numbers, you can specify a default number with which the contact is to be called. The default phone number of a favorite can be determined in the context menu from the symbol with the activated check box.

Related Topics

- Making Calls
- How to Add a Group to the Favorites List
- How to Rename a Group in the Favorites List
- How to Delete a Group from the Favorites List
- How to add a Contact to the Favorites List
- How to Delete a Contact from the Favorites List
- How to Specify a Default Number for a Favorite
- How to Change the Width of the Favorites List
- User Interface Elements
- How to Pick up a Call for Another Subscriber
- How to Create a Favorites List
- Directories
- How to Make a Call from the Favorites List
- How to Add Conference Participants
- How to Send an Instant Message
- Presence status
- Configuration

4.4.1 How to Add a Group to the Favorites List

Step by Step:

1. Right-click in a free area of the Favorites list to open the context menu and select **New Group**.
2. Enter a **Group Name**.
3. Click **OK**.

Next steps: Add contacts to the Favorites list.

Related Topics

- Favorites List
- How to add a Contact to the Favorites List
- How to Delete a Group from the Favorites List
- How to Rename a Group in the Favorites List

4.4.2 How to Rename a Group in the Favorites List

Step by Step:

1. Click on **Rename Group** in the context menu for the relevant group name in the Favorites list.
2. Enter a **Group Name**.
3. Click **OK**.

Related Topics

- Favorites List
- How to Add a Group to the Favorites List
- How to Delete a Group from the Favorites List

4.4.3 How to Delete a Group from the Favorites List

Step by Step:

1. Click on **Remove Group** in the context menu for the relevant group name in the Favorites list.
2. Click **Yes**.

Related Topics

- Favorites List
- How to Add a Group to the Favorites List
- How to Rename a Group in the Favorites List

4.4.4 How to add a Contact to the Favorites List

Prerequisites:

- The Favorites list contains at least one group.

Step by Step:

1. Click the **Directories** tab.
2. Select one of the following options:
   - Click on one of the directories: **Internal Directory**, **External Directory** or **Personal Directory**.
   - Perform a search in the directories; see How to Search in Directories for details.

3. Drag the desired contact to the group name in the Favorites list.

Related Topics

- Favorites List
- Directories
- How to Search in Directories
- How to Specify a Default Number for a Favorite
- How to Add a Group to the Favorites List
- How to Delete a Contact from the Favorites List

4.4.5 How to Delete a Contact from the Favorites List

Step by Step:

1. Click on **Remove Favorite** in the context menu for the relevant contact in the Favorites list.

Related Topics

- Favorites List
- How to add a Contact to the Favorites List

4.4.6 How to Specify a Default Number for a Favorite

Step by Step:

1. Click on **Select Phone Number** in the context menu for the relevant contact in the Favorites list.
2. Select the phone number that you want to use by default for this favorite from the drop-down list.
3. Click **OK**.

Related Topics

- Favorites List
- How to add a Contact to the Favorites List
- How to Make a Call from the Favorites List

4.4.7 How to Change the Width of the Favorites List

Step by Step:

1. Move the right edge of the Favorites list with the mouse in the desired direction.

Related Topics

- Favorites List
- User Interface Elements

4.5 Journal

The Journal is the list of all your inbound and outbound calls. You can use it to quickly and easily call back your contacts or call them again directly from within the Journal.

Storage duration

The communication system saves a record of the calls in the Journal for a limited period of time, which can be configured by the administrator. When this time period expires, the entries are automatically deleted by the communication system.

Folder for Call Types

The calls are arranged on the following tabs:

- **Open**
  Contains the unanswered missed calls for which a call number was transmitted. As soon as you answer one of these calls, all associated entries with that call number are dropped from the list.
- **All calls**
- **Missed**
- **Answered**
- **Internal**
- **External**
- **Inbound**
- **Outbound**

Call Details

Every call is shown with the **Date** and **Time** and, if available, with the **Call number**. If a directory contains further details on the call number such as the **Last Name**, **First Name** and **Company**, then this information is also shown. In addition, the **Direction**, **Duration** and the **Call Complete** column are displayed. The width of all columns is variable.

Direction	Meaning
	Inbound
	Outbound

Call Complete	Meaning
	The call was successful or was answered.

Grouping

The calls in all folders are grouped by the same criterion, as selected by you:

- Date (for example, **Today**, **Yesterday**, etc., **Last Week**, **Two Weeks Ago**, **Three Weeks Ago**, **Last Month** and **Older**)
- Call number
- Last Name, First Name
- First Name, Last Name
- Company

The number of Journal entries contained in the group is displayed on the right of the group designation in parentheses.

Sorting

You can sort the calls in the Journal by any column in ascending or descending alphanumeric order. The direction in which the triangle at a column header is pointing indicates the ascending or descending order.

Zooming in on an Entry

You can zoom in on a specific entry one character at a time in the column by which the entries are sorted. For example, you could jump to the first Last Name starting with "Sen" one letter at a time. This method can also be used in the results of a search.

Related Topics

- Making Calls
- How to Group Journal Entries
- How to Sort the Journal
- User Interface Elements
- How to Make a Call from the Journal
- How to Zoom in on an Entry

4.5.1 How to Group Journal Entries

Step by Step:

1. Click on the **Journal** tab.
2. Click on one of the groups: **Open**, **All Calls**, **Missed**, **Answered**, **Internal**, **External**, **Inbound** or **Outbound**.
3. Select one of the following options in the context menu of any column header:
   - **Group By:Date**
   - **Group By:Phone Number**
   - **Group By:Last Name, First Name**
   - **Group By:First Name, Last Name**
   - **Group By:Company**

4. Double-click on the triangle on the left of the relevant group to expand the associated Journal entries.

Related Topics

- Journal
- How to Sort the Journal

4.5.2 How to Sort the Journal

Step by Step:

1. Click on the **Journal** tab.
2. Click on one of the groups: **Open**, **All Calls**, **Missed**, **Answered**, **Internal**, **External**, **Inbound** or **Outbound**.
3. If required, double-click on the triangle on the left of the relevant group to expand the associated Journal entries.
4. Click on one of the column titles, e.g., **Last Name**, to sort the Journal entries by this criterion in ascending alphanumeric order.
5. If you want to reverse the sort order, click again on column header.

Related Topics

- Journal
- How to Group Journal Entries
- How to Zoom in on an Entry

5 Screen Pops

Screen Pops (also called pop-up windows) offer you convenient ways to respond to incoming calls or new voicemails with a single click, for example.

A screen pop appears in the lower right corner of the screen. You can enable or disable screen pops by different methods. Some buttons in the screen pops change, depending on the situation.

Screen Pops on Inbound Calls

Screen pops show the caller's phone number and name (if the name details are available in a directory). The directories are searched in the following order: Personal Directory, Internal Directory, External Offline Directory and External Directory. The first hit, if found, is shown in the screen pop. The following functions are available:

- **Answer** and **Hang Up**
- **Forward** to voicemail box
- **Transfer**
- **Hold** and **Reconnect**
- **Record** and **Stop Rec.**

Opening Personal Contacts on Inbound Calls

You can select whether myPortal should open the appropriate personal contact for an inbound call.

Screen Pops on Outbound Calls

Screen pops show the caller's phone number and name (if the name details are available in a directory). The following functions are available:

- **Hang Up**
- **Transfer**
- **Hold** and **Reconnect**
- **Record** and **Stop Rec.**

Screen Pops on New Voicemails

Screen pops show the caller's phone number and name (if the name details are available in a directory) as well as the date and time the call was received. This can only be activated collectively for voicemails and fax messages. The following functions are available:

- **Rewind**
- **Play** and **Pause**
- **Stop**
- **Forward**

Screen Pops for New Fax Messages

Screen pops show the caller's phone number and name (if the name details are available in a directory) as well as the date and time the call was received. This can only be activated collectively for voicemails and fax messages. The **View** function is available.

Related Topics

- How to Enable or Disable Screen Pops on Inbound Calls
- How to Enable or Disable the Opening of Personal Contacts on Inbound Calls
- How to Enable or Disable Screen Pops on Outbound Calls
- How to Enable Screen Pops for New Voicemails and Fax Messages
- User Interface Elements
- Call Functions
- Directories
- Functions During a Call
- How to Enable or Disable Screen Pops on Changing the Presence Status
- How to Enable or Disable Screen Pops on Changing the Presence Status to Office
- Voicemail
- Fax Box

5.1 How to Enable or Disable Screen Pops on Inbound Calls

Step by Step:

1. Click **Setup**.
2. Click on the **Program Settings** tab.
3. Choose one the following options in the **Notifications** area:
   - If you want to enable screen pops for inbound calls, select the check box **Display tray pop on inbound calls**.
   - If you want to disable screen pops for inbound calls, clear the check box **Display tray pop on inbound calls**.
4. Click **Save**.

Related Topics

- Screen Pops
- How to Answer a Call
- How to Forward a Call to your Voicemail Box
- How to Transfer a Call
- How to End a Call
- How to Record a Call or a Conference
- How to End a Call

5.2 How to Enable or Disable the Opening of Personal Contacts on Inbound Calls

Step by Step:

1. Click **Setup**.
2. Click on the **Program Settings** tab.
3. Choose one the following options in the **Notifications** area:
   - If you want to enable the opening of personal contacts on inbound calls, select the check box **Display screen pop on inbound calls**.
   - If you want to disable the opening of personal contacts on inbound calls, clear the check box **Display screen pop on inbound calls**.
4. Click **Save**.

Related Topics

- Screen Pops
- Directories

5.3 How to Enable or Disable Screen Pops on Outbound Calls

Step by Step:

1. Click **Setup**.
2. Click on the **Program Settings** tab.
3. Choose one the following options in the **Notifications** area:
   - If you want to enable screen pops for inbound calls, select the check box **Display tray pop on inbound calls**.
   - If you want to disable screen pops for inbound calls, clear the check box **Display tray pop on inbound calls**.
4. Click **Save**.

Related Topics

- Screen Pops
- How to Transfer a Call
- How to End a Call
- How to Record a Call or a Conference
- How to End a Call

5.4 How to Enable Screen Pops for New Voicemails and Fax Messages

Step by Step:

1. Click **Setup**.
2. Click on the **Program Settings** tab.
3. Choose one the following options in the **Notifications** area:

- If you want to enable screen pops for new voicemails and Fax messages, select the check box **Display tray pop on new voice mail**.
- If you want to disable screen pops for new voicemails and Fax messages, clear the check box **Display tray pop on new voice mail**.

4. Click **Save**.

Related Topics

- Screen Pops
- Voicemail
- Fax Box
- Voicemail
- Fax Box

6 Functions During a Call

Many control functions are available from the Desktop during a call. For example, you can record a call, place a call on hold and then resume (unhold) the call, transfer it to another subscriber or end the call. Control functions during a call are also available in screen pops and in the menu bar.

Transferring a Call

The following methods can be configured for transferring calls:

- Blind transfer (also called an unscreened transfer):
  You can transfer the call without an answer from the subscriber at the destination of the transfer. In this case, you will receive a screen pop with the prompt: `Does the other party wish to accept this call?`
- Consultation transfer:
  You can transfer the call only if the subscriber at the destination of the transfer answers.

Placing a Call on Hold

The party placed on hold hears Music On Hold or an announcement until you resume the call.

Recording a Call or a Conference

Calls can only be recorded by *one* of the parties involved, and conferences can only be recorded by the conference controller. Active voice recording is signaled by an advisory tone every few seconds. If the communication system is configured for France, the parties receive an announcement at the start of the recording to indicate that the call is being recorded. After the recording is completed, this is indicated in the voicemail Inbox of the person recording the call.

Related Topics

- How to Configure the Transfer Method
- How to Transfer a Call
- How to End a Call
- How to Record a Call or a Conference
- How to End a Call
- Screen Pops

6.1 How to Configure the Transfer Method

Step by Step:

1. Click **Setup**.
2. Click on the **Program Settings** tab.
3. Select one of the following options from the **Transfer Method** drop-down list in the **Miscellaneous** area:

- If you want to use a blind (i.e., unscreened) transfer, select **Blind Transfer**.
- If you want to use a consultation (i.e., screened) transfer, select **Consultation Transfer**.

4. Click **Save**.

Related Topics

- Functions During a Call
- How to Transfer a Call

6.2 How to Transfer a Call

Prerequisites:

- Screen pops for inbound and outbound calls have been activated.

Step by Step:

1. Click on **Transfer** in the **Inbound Call** and **Outbound Call to …** screen pops.
2. Click on the desired subscriber in the subscriber list and then on **Transfer**.
3. If you receive a window with the prompt: `Does the other party wish to accept this call?`, click **Yes**.

Related Topics

- Functions During a Call
- How to Enable or Disable Screen Pops on Inbound Calls
- How to Enable or Disable Screen Pops on Outbound Calls
- How to Configure the Transfer Method

6.3 How to End a Call

Prerequisites:

- Screen pops for inbound and outbound calls have been activated.

Step by Step:

1. Click on **Hold** in the **Inbound Call** and **Outbound Call to …** screen pops.
2. When you want to resume (unhold) the call, click on **Reconnect**.

Related Topics

- Functions During a Call
- How to Enable or Disable Screen Pops on Inbound Calls
- How to Enable or Disable Screen Pops on Outbound Calls

6.4 How to Record a Call or a Conference

Prerequisites:

- Screen pops for inbound and outbound calls have been activated.
- You are currently conducting a call or participating in a conference.

Step by Step:

1. Click on **Record** in the **Inbound Call** and **Outbound Call to …** screen pops.
2. If you want to stop the recording before the call ends, click on **Stop Rec.**.

Related Topics

- Functions During a Call
- How to Enable or Disable Screen Pops on Inbound Calls
- How to Enable or Disable Screen Pops on Outbound Calls
- Ad-hoc conference
- Scheduled Conference

6.5 How to End a Call

Step by Step:

1. Select one of the following options:
   - Click on **Hang Up** in the **Inbound Call** and **Outbound Call to …** screen pops.
   - Click on **Hang Up** in the menu bar.

Related Topics

- Functions During a Call
- How to Enable or Disable Screen Pops on Inbound Calls
- How to Enable or Disable Screen Pops on Outbound Calls

7 Controlling Availability

You can control your availability by using a number of powerful functions of the communication system.

Forwarding a Call to the Voicemail Box

If you do not want to accept a call, you can forward it to your voicemail box with one click.

Presence-based Functions

You can control your availability based on your Presence status by the following methods:

- Status-based call forwarding
- Rule-based call forwarding
- Personal AutoAttendant

CallMe Service

The CallMe Service enables you to use the Unified Communications functions of the communication system at any workplace exactly as in your office: at the phone and also with myPortal (provided you are connected to your company LAN).

Related Topics

- How to Forward a Call to your Voicemail Box
- Presence status
- CallMe service
- Status-based Call Forwarding
- Rule-Based Call Forwarding
- Personal AutoAttendant

7.1 How to Forward a Call to your Voicemail Box

Prerequisites:

- Screen pops for inbound calls have been activated.

Step by Step:

1. Click in the **Inbound Call** screen pop on **Forward**.

Related Topics

- Controlling Availability
- How to Enable or Disable Screen Pops on Inbound Calls
- Voicemail

7.2 Presence status

The Presence status indicates the availability of internal subscribers in the Favorites list, the internal directory, the virtual conference room and via voicemail announcements. In addition, the Presence status controls the availability of internal subscribers with status-based call forwarding, rule-based call forwarding and the personal AutoAttendant.

You can change your Presence status in myPortal and also in the Phone menu of the voicemail box. For every change in the Presence status (except for **Office** and **CallMe**), you also define the scheduled time of your return to the **Office** or **CallMe** status.

The drop-down list for the Presence status includes the following symbols:

Symbol	Presence status	Availability
	Office Only selectable if the CallMe service is not active Otherwise, **CallMe** appears here.	Available at the normal workplace
	CallMe Only selectable if the CallMe service is active Otherwise, **Office** appears here.	Available at an alternative workplace
	Meeting	Absent
	Sick	Absent
	Break	Absent
	Out of the Office	Absent
	Vacation	Absent
	Lunch	Absent
	Gone Home	Absent
	Do Not Disturb	Absent

CallMe is shown in the Favorites list and in the internal directory as **Office**. The following additional symbols are available there:

Symbol	Presence or connection status
	Phone is ringing
	Subscriber is calling
	Subscriber is on the phone
	Presence status is not visible
	Phone is not connected

INFO: For subscribers without system telephones (e.g., ISDN or analog), the Favorites list and the internal directory do not indicate any presence, but only the connection status.

Call Forwarding to the Voicemail Box

If your Presence status is not **Office** or **CallMe**, the communication system redirects calls to you to your voicemail box by default and notifies the callers via status-based announcements about the nature of your absence and the scheduled time for your return.

Automatic Reset of the Presence Status

You can have your Presence status automatically reset to the previously active **Office** or **CallMe** status at the end of your scheduled absence. Otherwise, the communication system extends the current Presence status in increments of 15 minutes until you change it yourself.

Visibility of your Presence Status

For each subscriber in the internal directory, you can specify whether that subscriber can see your Presence status other than **Office** and **CallMe** as well as the scheduled time of your return.

Automatic Update of Presence Status via Outlook Appointments

You can automatically control your Presence status via Outlook appointments by using the following keywords in the Subject line:

- **Meeting**
- **Sick**
- **Pause**
- **Out of the Office**
- **Vacation**
- **Lunch**
- **Gone Home**

The keywords depend on the language set for the user interface. The keywords may be located anywhere in the Subject line. If the Subject line contains more than one such keyword, only the fist takes effect. When this function is enabled, your Presence status changes automatically at the start and end time of the relevant appointment. Your PC need not be operating at this time.

> ***NOTICE:*** When enabling this function, please bear in mind that any Outlook appointments with these keywords in the Subject line could lead to undesirable changes in your Presence status. Consequently, you may nee to change the Subject line if needed.

Automatic Creation of Outlook Appointments when Absent

You can have appropriate Outlook appointments created automatically when you are absent by a change in your Presence status. The Subject line of the corresponding Outlook appointment consists of your Presence status and the text "(Auto)", for example: "Meeting (Auto)". The start and end times for the appointment involved correspond to your entries in myPortal. The end time of the Outlook appointment remains unchanged in the event of a possibly delayed return. The Outlook appointments are created on the Exchange Server, regardless of whether or not your Outlook is open.

Screen Pops on Changing the Presence Status

You can have changes to your Presence status indicated by a screen pop. You can set this separately for the **Office** status.

Related Topics

- Controlling Availability
- How to Change the Presence Status Office or CallMe to Absent
- How to Change the Presence Status to Office
- How to Enable or Disable Automatic Resetting of the Presence Status
- How to Change the Visibility of your Presence Status for Others
- How to Enable or Disable Automatic Updating of the Presence Status via Outlook Appointments
- How to Enable or Disable the Automatic Creation of Outlook Appointments when Absent
- How to Enable or Disable Screen Pops on Changing the Presence Status
- How to Enable or Disable Screen Pops on Changing the Presence Status to Office
- User Interface Elements
- Directories
- Favorites List
- How to Enable or Disable the Announcement of your Presence Status for External Callers
- How to Enable or Disable the Announcement of your Presence Status for Specific Callers
- CallMe service
- Status-based Call Forwarding
- Rule-Based Call Forwarding
- Personal AutoAttendant
- Phone Menu of the Voicemail Box

7.2.1 How to Change the Presence Status Office or CallMe to Absent

Step by Step:

1. Select one of the following options in the drop-down list for the Presence status: **Meeting**, **Sick**, **Break**, **Out of the Office**, **Vacation**, **Lunch**, **Gone Home** or **Do Not Disturb**.
2. Select one of the following options to specify the time of your return:
   - Click on one the four buttons with the desired time duration.
   - Select a time and a date in the calendar control.

3. Click **OK**.

Related Topics

- Presence status
- How to Change the Presence Status to Office
- How to Enable or Disable Automatic Resetting of the Presence Status
- How to Enable the CallMe Service

7.2.2 How to Change the Presence Status to Office

Step by Step:

1. Select **Office** in the drop-down list for the Presence status.
2. Click on **Return to the office** and then on **OK**.

Related Topics

- Presence status
- How to Change the Presence Status Office or CallMe to Absent
- How to Enable or Disable Automatic Resetting of the Presence Status

7.2.3 How to Enable or Disable Automatic Resetting of the Presence Status

Step by Step:

1. Click **Setup**.
2. Click on the **Program Settings** tab.
3. Choose one the following options in the **Miscellaneous** area:
   - If you want to enable automatic resetting of the Presence status to **Office** or **CallMe**, select the **Auto back to office** check box.
   - If you want to disable automatic resetting of the Presence status to **Office** or **CallMe**, clear the check box **Auto back to office** check box.
4. Click **Save**.

Related Topics

- Presence status
- How to Change the Presence Status Office or CallMe to Absent
- How to Change the Presence Status to Office
- How to Enable the CallMe Service

7.2.4 How to Change the Visibility of your Presence Status for Others

Step by Step:

1. Click **Setup**.
2. Click on the **Program Settings** tab.

3. Select one of the following options in the **Presence Visibility** area:
   - If you want to make your presence visible to a specific subscriber, enable the check box in the appropriate row.
   - If you want to make your presence invisible to a specific subscriber, clear the check box in the appropriate row.
   - If you want to make your presence visible to all subscribers, click **Select All**.
   - If you want to make your presence invisible to all subscribers, click **Unselect All**.
4. Click **Save**.

Related Topics

- Presence status
- How to Enable or Disable the Announcement of your Presence Status for Specific Callers
- How to Enable or Disable the Announcement of your Presence Status for External Callers

7.2.5 How to Enable or Disable Automatic Updating of the Presence Status via Outlook Appointments

Step by Step:

1. Click **Setup**.
2. Click on the **Program Settings** tab.
3. Choose one the following options in the **Outlook** area:
   - If you want to enable automatic updating of the Presence status via Outlook appointments, select the **Outlook Calendar Integration** check box.
   - If you want to disable automatic updating of the Presence status via Outlook appointments, clear the **Outlook Calendar Integration** check box.
4. Click **Save**.

Related Topics

- Presence status
- How to Enable or Disable the Automatic Creation of Outlook Appointments when Absent

7.2.6 How to Enable or Disable the Automatic Creation of Outlook Appointments when Absent

Step by Step:

1. Click **Setup**.
2. Click on the **Program Settings** tab.
3. Choose one the following options in the **Outlook** area:
   - If you want to enable the automatic creation of Outlook appointments when you are absent, select the check box **Automatically generate calendar appointments from my presence changes.**.
   - If you want to disable the automatic creation of Outlook appointments when you are absent, clear the check box **Automatically generate calendar appointments from my presence changes.**.
4. Click **Save**.

Related Topics

- Presence status
- How to Enable or Disable Automatic Updating of the Presence Status via Outlook Appointments

7.2.7 How to Enable or Disable Screen Pops on Changing the Presence Status

Step by Step:

1. Click **Setup**.
2. Click on the **Program Settings** tab.
3. Choose one the following options in the **Notifications** area:
   - If you want to enable screen pops on changing the Presence status, select the check box **Display tray pop on change of presence (status)**.
   - If you want to disable screen pops on changing the Presence status, clear the check box **Display tray pop on change of presence (status)**.
4. Click **Save**.

Related Topics

- Presence status
- Screen Pops
- How to Enable or Disable Screen Pops on Changing the Presence Status to Office

7.2.8 How to Enable or Disable Screen Pops on Changing the Presence Status to Office

Step by Step:

1. Click **Setup**.
2. Click on the **Program Settings** tab.
3. Choose one the following options in the **Notifications** area:
   - If you want to enable screen pops on changing the Presence status to **Office**, select the check box **Display tray pop for In Office presence**.
   - If you want to disable screen pops on changing the Presence status to **Office**, clear the check box **Display tray pop for In Office presence**.
4. Click **Save**.

Related Topics

- Presence status
- Screen Pops
- How to Enable or Disable Screen Pops on Changing the Presence Status

7.3 CallMe service

The CallMe service, which is extremely practical for teleworkers, in particular, can be used to define any phone at an alternative workplace as the CallMe destination at which you can be reached through your own internal phone number. You can use myPortal at your alternative workplace exactly as in the office and thus also make outgoing calls from the CallMe destination.

Inbound Calls

Inbound calls to your internal phone number are forwarded to your CallMe destination. Your internal phone number is displayed to the caller.

Outbound Calls

For outbound calls with myPortal, the communication system sets up two connections. It first calls you at your CallMe destination. If you answer the call, the communication system then calls the desired destination and connects you with it. Your internal phone number is displayed at the destination.

Presence status

When the CallMe service is enabled, the message "`CallMe active`" appears on the display of your telephone. For other subscribers, your Presence status is **Office**.

Activation

You can activate the CallMe service manually. In addition, the CallMe service also reactivated by an automatic reset of the Presence status following an absence, provided it was active earlier.

Deactivation

The CallMe service remains active until your Presence status changes.

Related Topics

- Controlling Availability
- How to Enable the CallMe Service
- Presence status

7.3.1 How to Enable the CallMe Service

Step by Step:

1. Select **Office** in the drop-down list for the Presence status.
2. Click on **Enable CallMe service**.
3. Set the call number of the CallMe destination by one of the following methods:
   - Select one of your additional call numbers from the drop-down list.
   - Enter the phone number in dialable format or in canonical format in the drop-down list
4. Click **OK**.

Related Topics

- CallMe service
- Call Number Formats
- How to Change the Presence Status Office or CallMe to Absent
- How to Enable or Disable Automatic Resetting of the Presence Status
- How to Define an Additional Phone Number

7.4 Status-based Call Forwarding

Status-based call forwarding enables you to forward calls based on your Presence status to one of your additional phone numbers or your voicemail box.

You can configure status-based call forwarding for every Presence status except **Office**, **CallMe** and **Do Not Disturb**. When you change your Presence status, the communication system activates call forwarding to the destination defined by you for this purpose. For example, if you are away from the office, to your mobile phone or if you are on vacation, to your representative.

Related Topics

- Controlling Availability
- How to Configure Status-based Call Forwarding
- Presence status
- How to Define an Additional Phone Number
- Rule-Based Call Forwarding

7.4.1 How to Configure Status-based Call Forwarding

Prerequisites:

- You have configured at least one additional phone number.

Step by Step:

1. Click **Setup**.
2. Click on the **Forwarding Destinations** tab.
3. Choose one of the following destinations from the drop-down list in the row with the appropriate Presence status in the **Destinations** area: **None**, **Mobile**, **Assistant**, **External 1**, **External 2**, **Home** or voicemail.
4. Click **Save**.

Related Topics

- Status-based Call Forwarding
- How to Define an Additional Phone Number

7.5 Rule-Based Call Forwarding

Rules-based call forwarding enables you to forward calls based on numerous conditions and exceptions even more flexibly than with status-based call forwarding.

In addition, rule-based call forwarding also supports:

- Any destinations
- Presence status **Office**, **CallMe** and **Do Not Disturb**

You can define rules are activate or deactivate them at any time by using the Rules wizard. A rule can only be active if your phone has not been forwarded.

When a call forwarding rule is active, its name appears on the display of your telephone.

When an inbound call is received, the communication system checks the applicability of the active rule in accordance with its sequential order in the Rules wizard. Only the first applicable rule is executed. In this case, your phone will ring once, and the communication system will then forward your call to the defined destination.

You can define several types of conditions and exceptions (except when ...) in one rule. However, you cannot define a condition with an exception of the same type. For example, it is not possible to define a condition of the type "On certain weekdays" together with an exception of the type "Except on certain weekdays".

Types of Conditions and Exceptions

- (except) for certain Presence status
- (except) from certain people (in the internal directory, external directory, personal directory or from any station number)
- (except) when transferred to you from certain people (in the internal directory, external directory, personal directory or from any station number)
- (except) from a certain type, i.e., internal or external
- (except) on a certain date (also on multiple dates)
- (except) on certain weekdays
- (except) between a certain Start and End date
- (except) between a certain Start and End time

Related Topics

- Controlling Availability
- How to Add a Call Forwarding Rule
- How to Edit a Call Forwarding Rule
- How to Copy a Call Forwarding Rule
- How to Rename a Call Forwarding Rule
- How to Remove a Call Forwarding Rule
- How to Change the Order of Call Forwarding Rules
- Presence status
- Status-based Call Forwarding

7.5.1 How to Add a Call Forwarding Rule

Step by Step:

1. Click **Setup**.
2. Click on the **Forwarding Destinations** tab.
3. Click in the **Rules Engine** area on **New**.
4. Enter a name for the rule under **Name for rule** (max. 15 characters).
5. Select one of the following options:
   - If you want the rule to take effect immediately, enable the check box **This rule is active**.

- If you do not want the rule to take effect yet, clear the check box **This rule is active**.

6. Click **Destination**.
7. Enter the phone number in dialable format or in canonical format and click **OK**.
8. Click **Next**.
9. If you want to add a condition, enable the check box **When ...** in the appropriate row and click in the lower area on the desired underlined details (**Start Date**, **End Date**, **Start Time**, **End Time**, **People**, **Type**, **Date Values**, **Weekdays**, **transfer people** or **Presence Status**) to specify the condition more precisely in the next dialog.
10. Click **Next**.
11. If you want to add an exception, enable the check box **Except when ...** in the appropriate row and click in the lower area on the desired underlined details (**Start Date**, **End Date**, **Start Time**, **End Time**, **People**, **Type**, **Date Values**, **Weekdays** or **Presence Status**) to specify the exception more precisely in the next dialog.
12. Click on **Next**, followed by **Finish**.
13. Click **Save**.

Related Topics

- Rule-Based Call Forwarding
- Call Number Formats
- How to Edit a Call Forwarding Rule
- How to Copy a Call Forwarding Rule
- How to Rename a Call Forwarding Rule
- How to Remove a Call Forwarding Rule
- How to Change the Order of Call Forwarding Rules

7.5.2 How to Edit a Call Forwarding Rule

Step by Step:

1. Click **Setup**.
2. Click on the **Forwarding Destinations** tab.
3. Click on the relevant rule in the **Rules Engine** area and then on **Edit**.
4. Select one of the following options:
   - If you want the rule to take effect immediately, enable the check box **This rule is active**.
   - If you do not want the rule to take effect, clear the check box **This rule is active**.

5. If you want to change the phone number, click in the lower area on the underlined phone number and then enter the desired phone number in dialable format or in canonical format and click **OK**.
6. Click **Next**.
7. Select one of the following options:
   - If you want to add a condition, enable the check box **When ...** in the appropriate row and click in the lower area on the desired underlined details (**Start Date**, **End Date**, **Start Time**, **End Time**, **People**, **Type**, **Date Values**, **Weekdays**, **transfer people** or **Presence Status**) to specify the condition more precisely in the next dialog.
   - If you want to edit a condition, click in the lower area on the appropriate underlined detail (**Start Date**, **End Date**, **Start Time**, **End Time**, **People**, **Type**, **Date Values**, **Weekdays**, **transfer people** or **Presence**) to specify the exception more precisely in the next dialog.
   - If you want to remove a condition, clear the **When …** check box in the appropriate row.
8. Click **Next**.
9. Select one of the following options:
   - If you want to add an exception, enable the check box **Except when ...** in the appropriate row and click in the lower area on the desired underlined details (**Start Date**, **End Date**, **Start Time**, **End Time**, **People**, **Type**, **Date Values**, **Weekdays** or **Presence Status**) to specify the exception more precisely in the next dialog.
   - If you want to edit an exception, click in the lower area on the appropriate underlined detail (**Start Date**, **End Date**, **Start Time**, **End Time**, **People**, **Type**, **Date Values**, **Weekdays** or **Presence Status**) to specify the exception more precisely in the next dialog.
   - If you want to remove an exception, clear the **Except when …** check box in the appropriate row.
10. Click on **Next**, followed by **Finish**.
11. Click **Save**.

Related Topics

- Rule-Based Call Forwarding
- Call Number Formats
- How to Add a Call Forwarding Rule
- How to Copy a Call Forwarding Rule
- How to Rename a Call Forwarding Rule
- How to Remove a Call Forwarding Rule
- How to Change the Order of Call Forwarding Rules

7.5.3 How to Copy a Call Forwarding Rule

Step by Step:

1. Click **Setup**.
2. Click on the **Forwarding Destinations** tab.
3. Click on the relevant rule in the **Rules Engine** area and then on **Copy**.
4. Enter a name for the new rule (max. 15 characters) and click **OK**.
5. Click **Save**.

Related Topics

- Rule-Based Call Forwarding
- How to Add a Call Forwarding Rule
- How to Edit a Call Forwarding Rule
- How to Rename a Call Forwarding Rule
- How to Remove a Call Forwarding Rule
- How to Change the Order of Call Forwarding Rules

7.5.4 How to Rename a Call Forwarding Rule

Step by Step:

1. Click **Setup**.
2. Click on the **Forwarding Destinations** tab.
3. Click on the relevant rule in the **Rules Engine** area and then on **Rename**.
4. Enter a new name for the new rule (max. 15 characters) and click **OK**.
5. Click **Save**.

Related Topics

- Rule-Based Call Forwarding
- How to Add a Call Forwarding Rule
- How to Edit a Call Forwarding Rule
- How to Copy a Call Forwarding Rule
- How to Remove a Call Forwarding Rule
- How to Change the Order of Call Forwarding Rules

7.5.5 How to Remove a Call Forwarding Rule

Step by Step:

1. Click **Setup**.
2. Click on the **Forwarding Destinations** tab.
3. Click on the relevant rule in the **Rules Engine** area and then on **Remove**.

4. Click on **Yes**, followed by **Save**.

Related Topics

- Rule-Based Call Forwarding
- How to Add a Call Forwarding Rule
- How to Edit a Call Forwarding Rule
- How to Copy a Call Forwarding Rule
- How to Rename a Call Forwarding Rule
- How to Change the Order of Call Forwarding Rules

7.5.6 How to Change the Order of Call Forwarding Rules

Step by Step:

1. Click **Setup**.
2. Click on the **Forwarding Destinations** tab.
3. Click in the **Rules Engine** area on the rule that you want to move.
4. Select one of the following options:
   - If you want to move the rule up by one position in the order, click on **Move Up**.
   - If you want to move the rule down by one position in the order, click on **Move Down**.
5. Click **Save**.

Related Topics

- Rule-Based Call Forwarding
- How to Add a Call Forwarding Rule
- How to Edit a Call Forwarding Rule
- How to Copy a Call Forwarding Rule
- How to Rename a Call Forwarding Rule
- How to Remove a Call Forwarding Rule

7.6 Personal AutoAttendant

The personal AutoAttendant offers callers the option of forwarding their calls to the phone numbers defined by you or to your voicemail box, depending on your Presence status. Callers signal their choice by entering digits at the phone.

Custom Profiles for Presence Status

For every Presence status there is a custom profile in which you can define the choices for your callers. You can activate or deactivate each profile separately. By default, no profile is active. When you deactivate a profile, the default behavior of your voicemail applies to the Presence status involved.

Announcements

When this profile is activated, the voicemail box plays back the following announcements:

- Name announcement:
  If you have enabled dynamic announcements, the name announcement you recorded is used for the greeting, unless your Presence status is **Office**, **CallMe** or **Do Not Disturb**.
- Dynamic announcements:
  If you have enabled dynamic announcements, the voicemail box generates situation-based announcements for your Presence status (except for **Office**, **CallMe** and **Do Not Disturb**) with an indication of the scheduled time of your return, e.g., "`... is in a meeting until two thirty p.m. today`". You can activate or deactivate the playback of dynamic announcements individually for each profile. If the dynamic announcements for a profile have been enabled, you can activate or deactivate the announcements for your Presence status for certain callers and for all external callers separately.
- Personal announcement for the profile:
  Before you activate a profile, you must record a personal announcement for this profile that indicates to your caller the appropriate digits and associated choices, e.g.: To leave a message, press 1. To speak with my representative, press 2. To forward this call to my mobile phone, press 3." When you disable dynamic announcements for the profile, you may find it useful to start your personal announcement by indicating your Presence status.

The voicemail box plays back announcements for a profile in the following order (from left to right):

Profile	Name announcement	Dynamic greetings	Personal announcement for profile
Busy	-	-	x
No answer	-	-	x
Meeting	x (if dynamic announcements have been enabled)	x (if dynamic announcements have been enabled)	x
Sick			
Pause			
Out of the Office			
Vacation			
Lunch			
Gone Home			
Do Not Disturb	-	-	x

Example: dynamic announcements enabled

Profile	Name announcement	Dynamic greetings	Personal announcement for profile
Meeting	"Natalie Dubois"	"is in a meeting until two thirty p.m. today".	"To leave a message, press 1. To speak with my representative, press 2."

Example: dynamic announcements disabled

Profile	Name announcement	Dynamic greetings	Personal announcement for profile
Out of the Office	-	-	"I am currently out of the office. To leave a message, press 1. To speak with my representative, press 2. To forward this call to my mobile phone, press 3."

Actions

When editing the profile, you can define the appropriate actions for the digits indicated in the announcement.

- **Record**
  The caller can leave a message in your voicemail box.
- **Transfer**
  The caller is redirected to a destination defined by you.
- **- None -**
  The announcements for this profile are repeated.

Related Topics

- Controlling Availability
- How to Edit a Profile for the AutoAttendant
- Presence status
- How to Enable or Disable the Announcement of your Presence Status for External Callers
- How to Enable or Disable the Announcement of your Presence Status for Specific Callers
- Voicemail

7.6.1 How to Edit a Profile for the AutoAttendant

Prerequisites:

- You have recorded an announcement for the relevant status.

Step by Step:

1. Click **Setup**.
2. Click on the **Profiles** tab.
3. Select the profile for the relevant status in the **Profiles** drop-down list.
4. In the row with the appropriate digit, select one of the following options for the desired **Action**:
   - If the callers are to be redirected to the voicemail box on entering this digit, select **Record**.
   - If the callers are to be transferred to another destination on entering this digit, select **Transfer**.
   - If no action is to be taken on entering this digit, select **- None -**.
5. If you have selected **Transfer**, enter the phone number in dialable format or in canonical format in the **Destination** field.
6. Select one of the following options for the function of the profile:
   - If you want to activate the profile, enable the **Profile Active** check box.
   - If you want to deactivate the profile, disable the **Profile Active** check box.
7. Select one of the following options for the announcement of your Presence status:
   - If you want your voicemail box to announce your Presence status, clear the **Skip Dynamic Greeting** check box.
   - If you do not want your voicemail box to announce your Presence status, enable the **Skip Dynamic Greeting** check box.
8. Click **Save**.

Related Topics

- Personal AutoAttendant
- Call Number Formats
- How to Record an Announcement

8 Conferencing (only HiPath OpenOffice ME)

In a conference, multiple participants can communicate with one another at the same time. The Conference Management function of myPortal enables you to quickly and easily host different types of conferences and also to schedule them in advance.

INFO: Only conferences initiated with myPortal can be used in myPortal. Conferences initiated by phone can only be used with a phone.

The various conference types have the following features:

Feature	Ad-hoc	Scheduled (MeetMe)	Permanent
Start	Manually, immediately	Automatically by schedule	Manually
End	Manually	Automatically by schedule or manually	Manually
Extension possible	-	x	-
Recurrence possible	Manually	Regularly by schedule	-
Direction of connection setup from the viewpoint of the communication system	Outbound	Outbound or Inbound	Inbound
Authentication of conference participants possible	-	x	x
Recording possible	x	x	-

Virtual conference room

The virtual conference room enables you to follow a conference and its participants in a graphical environment and to also manage the conference if you are the conference controller.

Symbol	Meaning
	Conference Controller
	Communication system – Conference is stopped
	Communication system – Conference is being started

Symbol	Meaning
	Communication system – Conference has started
	Communication system – Conference is being recorded
	Communication system – Conference is being stopped
	Scheduled conference participant (symbol in accordance with current Presence status)
	Called conference participant
	Dial-in conference participant
	Authenticating conference participant
	Connected conference participant

Every arrow between the communication system and the conference controller or its participants indicates the direction of the connection setup from the viewpoint of the communication system.

- **Outbound**:
  The communication system calls the participant. Note that this applies to internal participants only if the subscriber has not enabled forwarding to voicemail.
- **Inbound**:
  The conference participants or conference controller dials into the conference using the dial-in number.

While participating in a conference, making calls or accepting another call disconnects the participant from the conference.

Conference Controller

The initiator of a conference is the conference controller. The controller can:

- Add or remove conference participants:
  Removed participants do not remain in the virtual conference room.

- Disconnect or reconnect conference participants:
  Disconnected participants remain in the virtual conference room. When connecting or disconnecting a conference participant, the other participants hear an alert tone. When the conference controller is connecting a conference participant, all other conference participants remain connected to one another. If there is only one participant connected, that participant will hear music on hold.
- Record the conference (ad-hoc and scheduled conferences)
- Set another internal participant as the conference controller
- Leave the conference without ending it:
  The internal participant who has been attending the conference for the longest period of time automatically becomes the conference controller.
- End the conference

Dial-in Number

The dial-in number for conferences must be set by the administrator. myPortal shows this number.

Automatic End of Conference without Internal Conference Participants

If only external participants remain in a conference, the communication system ends the conference automatically after a time period set by the administrator expires. Before this occurs, the conference participants hear an alert tone.

External Conference Participants

The maximum number of external conference participants is determined, among other things, by the number of available trunks.

System-Specific Information

- Maximum of 5 conferences simultaneously
- Maximum of 16 conference participants in total
- Maximum of 16 conference participants in a single conference
- Maximum of 10 conferences per subscriber
- Maximum duration until automatic release of a conference without a conference controller
  255 minutes
- Maximum time interval from alert tone until automatic termination:
  5 minutes

Related Topics

- Ad-hoc conference
- Scheduled Conference
- Permanent Conference
- User Interface Elements
- How to Specify an E-Mail Address

8.1 Ad-hoc conference

An ad-hoc conference occurs spontaneously and is started manually by the conference controller. The conference controller can save ad-hoc conferences in order to set them up again at some later point in time.

Starting the Conference

The communication system opens the window with the virtual conference room automatically for all conference participants, provided the participants have started myPortal or myPortal for Outlook. The communication system calls all conference participants simultaneously. On joining the conference, each conference participant hears a greeting announcement with the name of the conference controller.

Recording the Conference

The conference controller can optionally record an ad-hoc conference in his or her voicemail box. The duration of the recording is only limited by the available storage capacity of the communication system.

Ending the Conference

The conference controller can end the conference in the virtual conference room or simply hang up. Alternatively, the conference ends when all conference participants have left the conference.

Related Topics

- Conferencing (only HiPath OpenOffice ME)
- How to Configure and Initiate an Ad-hoc Conference
- How to View an Ad-hoc Conference as a Conference Controller
- How to Add Conference Participants
- How to Disconnect a Conference Participant
- How to Reconnect Conference Participants
- How to Remove Conference Participants
- How to Specify Another Conference Controller
- How to End an Ad-hoc or Scheduled Conference
- How to Repeat an Ad-hoc Conference
- How to Record a Call or a Conference

8.1.1 How to Configure and Initiate an Ad-hoc Conference

Step by Step:

1. Click **Conference**.
2. Click **Start new conference**. The **AdHoc Conference** window opens with you set as the conference controller.
3. Add any conference participants as needed; see How to Add Conference Participants for details.

4. Click in the **AdHoc Conference** window on **Conference Room > Start**. The communication system now calls you and the conference participants.
5. If you want to repeat the ad-hoc conference with the same set of participants later, you can now save it. To do this:
   a) Click **File > Save**
   b) Click on the **General Settings** tab and enter a name for the conference in the input field.
   c) Click **Save**.

Related Topics

- Ad-hoc conference
- Call Number Formats
- How to End an Ad-hoc or Scheduled Conference
- How to Repeat an Ad-hoc Conference
- How to Add Conference Participants

8.1.2 How to View an Ad-hoc Conference as a Conference Controller

Step by Step:

1. Click **Conference**.
2. Click **Manage my conferences**.
3. Click on the **My Conferences** tab.
4. Click on a conference under **Conference Name**.
5. Click **View**.

Related Topics

- Ad-hoc conference

8.1.3 How to Add Conference Participants

Prerequisites:

- A conference with you as the conference controller has been started in the virtual conference room.

Step by Step:

1. Add the conference participants by one of the following methods:
   - From the Favorites list:
     Using the mouse, drag one of the participants from the **Favorites** into the **AdHoc Conference** window. Select a station number from the **Number To Contact** drop-down list in the **Select Participant Contact Number** window and click **OK**.

- From a directory:

  Using the mouse, drag one of the participants from the **Directories** into the **AdHoc Conference** window. Select a station number from the **Number To Contact** drop-down list in the **Select Participant Contact Number** window and click **OK**.

- From the results of a search:

  Search the directories (see How to Search in Directories for details) and then drag any of the participants from the listed results into the **AdHoc Conference** window. Select a station number from the **Number To Contact** drop-down list in the **Select Participant Contact Number** window and click **OK**.

- Any participant:

  Click in the **AdHoc Conference** window on **Participants > Add Participant**. Enter the following details for the participant in the **Add Participants** window: **Name**, **Phone Number** in dialable format or in canonical format and **E-mail** and then click **OK**.

Related Topics

- Ad-hoc conference
- Directories
- How to Search in Directories
- Favorites List
- How to Configure and Initiate an Ad-hoc Conference
- How to Configure a Scheduled Conference
- How to Configure a Permanent Conference
- How to Remove Conference Participants
- Scheduled Conference
- Permanent Conference

8.1.4 How to Disconnect a Conference Participant

Prerequisites:

- An active conference with you as the conference controller has been started in the virtual conference room.

Step by Step:

1. Click in the context menu of the relevant conference participant on **Disconnect > Disconnect Participant**.

Result:

The connection to the participant is cleared. The participant remains in the virtual conference room.

Related Topics

- Ad-hoc conference
- How to Reconnect Conference Participants
- Scheduled Conference

8.1.5 How to Reconnect Conference Participants

Prerequisites:

- An active conference with you as the conference controller has been started in the virtual conference room.

Step by Step:

1. Click in the context menu of the relevant conference participant on **Reconnect Participant**.

Related Topics

- Ad-hoc conference
- How to Disconnect a Conference Participant
- Scheduled Conference

8.1.6 How to Remove Conference Participants

Prerequisites:

- A conference with you as the conference controller has been started in the virtual conference room.

Step by Step:

1. Select one of the following options in the context menu of the relevant conference participant:
   - If the conference participant is currently active, click **Remove**.
   - If the conference participant is not currently active in the conference, click on **Disconnect > Disconnect and Remove Participant**.

Result:

The connection to the participant is cleared. The participant is removed from the virtual conference room.

Related Topics

- Ad-hoc conference
- How to Add Conference Participants
- Scheduled Conference
- Permanent Conference

8.1.7 How to Specify Another Conference Controller

Prerequisites:

- A conference with you as the conference controller has been started in the virtual conference room.

Step by Step:

1. Click in the **AdHoc Conference** window on **Conference Room > Properties**.
2. Click on the **Participants** tab.
3. Click on the conference participant whom you want to set as the conference controller.
4. Click in the area with the participant details on **Set as conference controller**.

5. Click **Save**.

Related Topics

- Ad-hoc conference
- Scheduled Conference
- Permanent Conference

8.1.8 How to End an Ad-hoc or Scheduled Conference

Prerequisites:

- An active conference with you as the conference controller has been started in the virtual conference room.

> ***INFO:*** You can also end an ad-hoc conference by hanging up.

Step by Step:

1. Click **Conference Room > Stop**.
2. Under **End In:**, enter the waiting time in seconds until the conference is to be terminated and then click **OK**.

Related Topics

- Ad-hoc conference
- How to Configure and Initiate an Ad-hoc Conference
- Scheduled Conference

8.1.9 How to Repeat an Ad-hoc Conference

Prerequisites:

- You have saved an ad-hoc conference.

Step by Step:

1. Click **Conferencing**.
2. Click **Manage my conferences**.
3. Click on the **My Conferences** tab.
4. Click on a conference under **Conference Name**.
5. Click **Start Conference**. The communication system now calls you and the conference participants.

Related Topics

- Ad-hoc conference
- How to Configure and Initiate an Ad-hoc Conference

8.2 Scheduled Conference

A scheduled conference (Meet-Me conference) occurs at some point in the future with a defined duration and may be set up to recur repeatedly at the same time.

A scheduled conference will run for the entire scheduled duration even if there are no active participants. The conference controller saves a scheduled conference under a specified name.

Options for Configuring a Scheduled Conference

The initiator of the conference can define the following properties:

- Start time and End time
- Recurring conference
- Presence of conference controller required
- Authentication of conference participants on joining the conference required (by entering a PIN and Password via the phone keypad).

  INFO: Mobility Entry users must enter the code for DTMF dialing before their authentication.

  The default password for conferences is 1234. The conference controller can change this for the conference participants individually.
- Language of announcements before the conference begins
- Direction for the connection setup for each conference participant (default: **outbound**).

Invitation

The conference controller must inform the participants about the details of the conference. This includes:

- Date and time of the start and end of the conference
- Participant's PIN (optional)
- Password (optional)
- Dial-in number (mandatory for conference participants for whom the direction of the connection setup is **Inbound**)

Starting the Conference

The communication system opens the window with the virtual conference room at the scheduled time automatically for all conference participants, provided the participants have started myPortal or myPortal for Outlook. If the presence of the conference controller is required, the communication system first calls the controller. After the successful authentication of the controller, all the other conference participants are called simultaneously. Conference participants who have forwarded their calls to their voicemail boxes or who are determined to be absent by their presence status are not called. Depending on how the connection setup has been configured, the communication system calls the conference participants or the participants can dial in themselves. The communication

system announces every participant who joins the conference by name, as in: "`.... has joined the conference`", provided the initiator has recorded his or her name announcement.

> ***INFO:*** In order to enable the participants of a conference you have scheduled without authentication to hear the name announcement at the start of the conference, you will need to have first already initiated a conference with authentication on one occasion.

Dialing In

Every conference participant can use the dial-in number to dial into the conference within the scheduled time period, regardless of which direction for the conference setup was set for that participant.

Extending the Conference

Ten minutes before the scheduled end of the conference, the participants hear an announcement indicating that the conference is about to end and are offered the option of extending the conference by dialing a specific digit. Any conference participant can extend the conference by dialing that specific digit. The conference controller can extend the conference in myPortal at any time.

Recording the Conference

The conference controller can optionally record a scheduled conference in his or her voicemail box. The duration of the recording is only limited by the available storage capacity of the communication system.

Ending the Conference

The conference ends at the time scheduled for the end of the conference or if the conference controller terminates the conference in the virtual conference room.

Related Topics

- Conferencing (only HiPath OpenOffice ME)
- How to Configure a Scheduled Conference
- How to Display a Scheduled Conference as the Conference Controller
- How to Determine the Dial-in Number for a Scheduled or Permanent Conference
- How To Determine the PIN for a Scheduled or Permanent Conference
- How to Change the Password for a Scheduled or Permanent Conference
- How To Display a Scheduled or Permanent Conference as the Conference Controller
- How to Extend a Scheduled Conference
- How to Delete a Scheduled Conference
- How to Add Conference Participants
- How to Disconnect a Conference Participant
- How to Reconnect Conference Participants
- How to Remove Conference Participants
- How to Specify Another Conference Controller
- How to Record a Call or a Conference
- How to End an Ad-hoc or Scheduled Conference

8.2.1 How to Configure a Scheduled Conference

Prerequisites:

- Your administrator has configured a dial-in number for conferences.

Step by Step:

1. Click **Conference**.
2. Click **Start new conference**. The **AdHoc Conference** window opens with you set as the conference controller.
3. Add any conference participants as needed; see How to Add Conference Participants for details.
4. Click in the **AdHoc Conference** window on **Conference Room > Properties**.
5. Click on the **General Settings** tab and enter a name for the conference in the input field.
6. Enable the check box **This conference is active**.
7. If you want the conference to occur only when the conference controller is present, enable the check box **This conference requires the controller to be present**.
8. If you want to waive the requirement of entering a PIN to join the conference, enable the check box **This conference will not ask participants to enter their PIN numbers, or record their names.**.

9. Select the desired **Conference Language** in which the announcements for the authentication of the conference participants is to occur.
10. Click on the **Schedule** tab and select the **Start Date**, **Start Time** and **End Time**.
11. If the conference is to occur recurrently, click on **Recurring Conference**.
    a) Select an **End Date** for the last recurrence.
    b) Click on either **Daily Recurrence**, **Weekly Recurrence** or **Monthly Recurrence** and then select the additional options desired for it in the details.
12. If you want to change the direction of the connection setup for a conference participant, click on the **Participants** tab..
    a) Click in the context menu of the relevant conference participant on **Properties**.
    b) Under **Direction**, then click on **Outbound** or **Inbound**.
13. Click **Save**.

Related Topics

- Scheduled Conference
- Call Number Formats
- How to Add Conference Participants
- How to Delete a Scheduled Conference

8.2.2 How to Display a Scheduled Conference as the Conference Controller

Step by Step:

1. Click **Conference**.
2. Click **Manage my conferences**.
3. Click on the **My Conferences** tab.
4. Click on a conference under **Conference Name**.
5. If you want to display the virtual conference room, click **View**.
6. If you want to display the schedule of the conference, click on **Edit** and then on the **Schedule** tab.
7. If you want to display the general settings of the conference, click on **Edit** and then on the **General Settings** tab.

Related Topics

- Scheduled Conference
- How To Display a Scheduled or Permanent Conference as the Conference Controller

8.2.3 How to Determine the Dial-in Number for a Scheduled or Permanent Conference

Prerequisites:

- You are the conference controller.

> ***INFO:*** As the conference controller, you can obtain the dial-in number from the e-mail with the invitation to the conference.

Step by Step:

1. Click **Conference**.
2. Click **Manage my conferences**.
3. Click on the **My Conferences** tab.
4. Click on a conference under **Conference Name**.
5. Click **Edit**.
6. Click on the **General Settings** tab. The dial-in number can be found under **Conference DID**.
7. Click **Close**.
8. Click **Close**.

Related Topics

- Scheduled Conference
- Permanent Conference

8.2.4 How To Determine the PIN for a Scheduled or Permanent Conference

Prerequisites:

- You are the conference controller.

> ***INFO:*** As the conference controller, you can obtain the PIN from the e-mail with the invitation to the conference.

Step by Step:

1. Click **Conference**.
2. Click **Manage my conferences**.
3. Click on the **My Conferences** tab.
4. Click on a conference under **Conference Name**.
5. Click **Edit**.
6. Click on the **Participants** tab.
7. Click in the context menu of the relevant conference participant on **Properties**. The PIN can be found under **Identification Code**.
8. Click **Cancel**.

9. Click **Close**.

Related Topics

- Scheduled Conference
- Permanent Conference

8.2.5 How to Change the Password for a Scheduled or Permanent Conference

Prerequisites:

- You are the conference controller.

Step by Step:

1. Click **Conference**.
2. Click **Manage my conferences**.
3. Click on the **My Conferences** tab.
4. Click on a conference under **Conference Name**.
5. Click **Edit**.
6. Click on the **Participants** tab.
7. Click in the context menu of the relevant conference participant on **Properties**.
8. Enter the new **Password**.
9. Click **OK**.
10. Click **Save**.
11. Click **Close**.

Related Topics

- Scheduled Conference
- Permanent Conference

8.2.6 How To Display a Scheduled or Permanent Conference as the Conference Controller

Step by Step:

1. Click **Conference**.
2. Click **Manage my conferences**.
3. Click on the **Conferences that I belong to** tab.

4. Click on a conference under **Conference Name** and then on **View**.

Related Topics

- Scheduled Conference
- How to Display a Scheduled Conference as the Conference Controller
- Permanent Conference
- How to Display a Permanent Conference as the Conference Controller

8.2.7 How to Extend a Scheduled Conference

Prerequisites:

- An active conference with you as the conference controller has been started in the virtual conference room.

Step by Step:

1. Under **Conference Room > Extend Conference**, select one of the following methods:
   - Click on one of the entries **10 minutes**, **20 minutes**, **30 minutes** or **1 hour**.
   - Then click on **More …**, enter the desired time period for the extension under **Extend by:** in minutes, and click **OK**.

Related Topics

- Scheduled Conference

8.2.8 How to Delete a Scheduled Conference

Prerequisites:

- You are the conference controller.

Step by Step:

1. Click **Conference**.
2. Click **Manage my conferences**.
3. Click on the **My Conferences** tab.
4. Click on a conference under **Conference Name**.
5. Click on **Remove**, followed by **Close**.

Related Topics

- Scheduled Conference
- How to Configure a Scheduled Conference

8.3 Permanent Conference

A permanent conference is not subject to time restrictions. The conference participants can dial in at any time.

The conference controller saves a scheduled conference under a specified name. The conference is retained until it is explicitly deleted.

Options for Configuring a Scheduled Conference

The initiator of the conference can specify:

- whether the conference participants need to authenticate themselves by entering a PIN and password via the phone keypad when joining the conference.

  INFO: Mobility Entry users must enter the code for DTMF dialing before the authentication.

  The default password for conferences is 1234. The conference controller can change this for the conference participants individually.
- in which language the announcements before the start of then conference are to be made.

Starting the Conference

As soon as the first conference participant dials in, the communication system opens the virtual conference room for all internal conference participants. All conference participants dial in themselves. The communication system announces every participant who joins the conference by name, as in: "`.... has joined the conference.`"

Dialing In

Every conference participant can use the dial-in number to dial into the conference at any time.

Related Topics

- Conferencing (only HiPath OpenOffice ME)
- How to Configure a Permanent Conference
- How to Display a Permanent Conference as the Conference Controller
- How to Delete a Permanent Conference
- How to Add Conference Participants
- How to Remove Conference Participants
- How to Specify Another Conference Controller
- How to Determine the Dial-in Number for a Scheduled or Permanent Conference
- How To Determine the PIN for a Scheduled or Permanent Conference
- How to Change the Password for a Scheduled or Permanent Conference
- How To Display a Scheduled or Permanent Conference as the Conference Controller

8.3.1 How to Configure a Permanent Conference

Prerequisites:

- Your administrator has configured a dial-in number for conferences.

Step by Step:

1. Click **Conference**.
2. Click **Start new conference**. The **AdHoc Conference** window opens with you set as the conference controller.
3. Add any conference participants as needed; see How to Add Conference Participants for details.
4. Click in the **AdHoc Conference** window on **Conference Room > Properties**.
5. Click on the **General Settings** tab and enter a name for the conference in the input field.
6. Enable the check box **This conference is active**.
7. If you want the conference to occur only when the conference controller is present, enable the check box **This conference requires the controller to be present**.
8. If you want to waive the requirement of entering a PIN to join the conference, enable the check box **This conference will not ask participants to enter their PIN numbers, or record their names.**.
9. Enable the check box **Permanent Conference**.
10. Select the desired **Conference Language** in which the announcements for the authentication of the participants is to occur.
11. Click **Save**.

Related Topics

- Permanent Conference
- Call Number Formats
- How to Add Conference Participants
- How to Delete a Permanent Conference

8.3.2 How to Display a Permanent Conference as the Conference Controller

Step by Step:

1. Click **Conference**.
2. Click **Manage my conferences**.
3. Click on the **My Conferences** tab.
4. Click on a conference under **Conference Name**.
5. If you want to display the virtual conference room, click **View**.

6. If you want to display the general settings of the conference, click on **Edit** and then on the **General Settings** tab.

Related Topics

- Permanent Conference
- How To Display a Scheduled or Permanent Conference as the Conference Controller

8.3.3 How to Delete a Permanent Conference

Prerequisites:

- You are the conference controller.

Step by Step:

1. Click **Conference**.
2. Click **Manage my conferences**.
3. Click on the **My Conferences** tab.
4. Click on a conference under **Conference Name**.
5. Click on **Remove**, followed by **Close**.

Related Topics

- Permanent Conference
- How to Configure a Permanent Conference

9 Instant Messaging

Instant Messaging enables you to exchange instant messages (i.e., to chat) with other internal subscribers.

Sent and received instant messages appear on your screen and on the screens of your communication partners as a dialog in a separate **Instant Messaging** window An instant message always has only one recipient. When messaging with and alternating between multiple communication partners, every dialog has separate tabs with the name of each communication partner.

Context menus with the menu item **Send Instant Message** indicate whether the relevant subscriber is logged in by a symbol on the left.

Symbol	Status
	Logged in
	Logged out

INFO: If your communication partner has not started myPortal, the communication system saves your Instant Message and displays it at the next logon.

Related Topics

- How to Send an Instant Message

9.1 How to Send an Instant Message

Step by Step:

1. Select the recipient by one of the following methods:
   - Click on an internal subscriber in the **Favorites** list.
   - Click on a subscriber in **Directories > Internal Directory**.
2. Select **Send Instant Message** in the context menu.
3. Enter the text in the **Instant Messaging** window and click **Send**.

Related Topics

- Instant Messaging
- Directories
- Favorites List

10 Voice Messages and Fax

The unified messaging services Voicemail and Fax offer you convenient user interfaces for receiving and managing messages.

The Fax service is only available if your administrator of the communication system has configured it for you.

Related Topics

- Voicemail
- Managing Voicemail
- Fax Box
- Managing Fax Messages
- Sending Fax Messages
- Notification Service for Messages
- Phone Menu of the Voicemail Box

10.1 Voicemail

The voicemail box records voicemail messages and recorded calls centrally. You can access these messages using myPortal.

You can view or edit the settings of your voicemail box; for example, you can select the language of the voicemail box, determine its call number, switch between recording and announcement modes, record your announcements and control the announcement of your Presence status.

> ***INFO:*** In order to enable callers to reach your voicemail box on **Busy** and **No Answer**, the administrator must set up call forwarding to your voicemail box. Alternatively, you can also do this yourself by setting up a "call diversion after time" on your phone.

Determining the Call Number of the Voicemail Box

You can determine under which extension you can reach the voicemail box from any phone to listen to your voicemails or change your Presence status, for example.

Selecting the Recording or Announcement Mode

In Recording mode, callers can leave a message for you on reaching your voicemail box exactly as with an answering machine, whereas in Announcement mode, they will only hear your announcement. You can specify this setting separately for every Presence status.

Announcements

You can record or import the following types of announcements:

- Name announcement:
  Your name announcement is used at the start of conferences for which you have invited others and to announce when you join a conference. In addition, the name announcement you have recorded is used as a greeting when you have enabled the announcement of your Presence status for the caller involved and your Presence status is not **Office**, **CallMe** or **Do Not Disturb**.
- General personal greeting
  This announcement is heard by callers in default mode (i.e., when no custom profiles of the personal AutoAttendant are enabled) on reaching your voicemail box. For example: "I am unfortunately unable to take your call at this moment …"
- Personal greeting for **Busy**:
  This announcement is heard by callers in default mode (i.e., when no custom profiles of the personal AutoAttendant are enabled) on reaching your voicemail box when your line is busy. For example: "I am currently on the phone and unable to take your call …" If no personal greeting for **Busy** has been recorded, callers will hear your general personal greeting.
- Personal greeting for **No Answer**:
  This announcement is heard by callers in default mode (i.e., when no custom profiles of the personal AutoAttendant are enabled) when their calls are forwarded to your voicemail box manually or on no answer after a specific amount of time. For example: "I am unfortunately unable to take your call at this moment …" If you have not recorded any personal greeting for **No Answer**, callers will hear your general personal greeting.
- Personal announcements for custom profiles of the personal AutoAttendant:
  These announcements are not used by the voicemail box in default mode, but only in conjunction with the personal AutoAttendant.

The voicemail box can generate situation-based announcements of your Presence status (except for **Office**, **CallMe** and **Do Not Disturb**) with an indication of your scheduled time of return; for example: "`xxx is in a meeting until two thirty p.m. today`". You can enable or disable the announcement of your Presence status for specific callers and for all external callers separately.

In default mode, the voicemail box plays back announcements in the following order (from left to right):

Profile	Name announcement	Announcement of your Presence status	Personal greeting
Busy	-	-	for **Busy** (if not recorded: general)
No answer	-	-	for **No Answer** (if not recorded: general)

Profile	Name announcement	Announcement of your Presence status	Personal greeting
Meeting	x (if you have enabled the announcement of your Presence status for the caller involved)	x (if you have enabled the announcement of your Presence status for the caller involved)	general
Sick			
Pause			
Out of the Office			
Vacation			
Lunch			
Gone Home			
Do Not Disturb	-	-	general

Example: Announcement of your Presence status is enabled for the caller

Profile	Name announcement	Announcement of your Presence status	Personal greeting
Meeting	"Natalie Dubois"	"is in a meeting until two thirty p.m. today".	"I am unfortunately unable to take your call at the moment …"

Example: Announcement of your Presence status is disabled for the caller

Profile	Name announcement	Announcement of your Presence status	Personal greeting
Out of the Office	-	-	"I am unfortunately unable to take your call at the moment …"

Central AutoAttendant

The central AutoAttendant enables the administrator of your communication system to offer callers time-based choices to forward their calls to numbers he or she has defined or to your voicemail box. As with the personal AutoAttendant, callers signal their choices by entering digits at the phone. Due to the central AutoAttendant, further announcements may follow those described above.

Announcement of your Presence Status

You can define whether callers should hear the announcement of your Presence status on reaching your voicemail box. You can enable or disable this collectively for all external callers and for specific subscribers.

Retrieving your Voicemail through the Attendant

Using myAttendant, you can grant or deny the Attendant permission to access your voicemails and Fax messages. In the latter case, the Attendant can only determine how many messages you have.

Bypassing the Password Prompt

If you call the voicemail box from one of your additional phone numbers, you can bypass the password prompt. This setting also applies to the phone notification service of the voicemail box.

Language the Voicemail Box

You can define in which language the voicemail box plays back the menu choices and the internal system announcements.

Related Topics

- Voice Messages and Fax
- How to Determine the Call Number for your Voicemail Box
- How to Select Recording or Announcement Mode
- How to Record an Announcement
- How to Import an Announcement
- How to Enable or Disable the Announcement of your Presence Status for External Callers
- How to Enable or Disable the Announcement of your Presence Status for Specific Callers
- How to Grant or Deny the Attendant Permission to Retrieve Voicemail and Fax Messages
- How to Activate or Deactivate the Password Prompt for the Voicemail Box
- How to Select the Language of the Voicemail Box
- First Steps
- Screen Pops
- How to Enable Screen Pops for New Voicemails and Fax Messages
- How to Forward a Call to your Voicemail Box
- Personal AutoAttendant
- How to Record your Name Announcement
- How to Record your Personal Greeting
- How to Enable Screen Pops for New Voicemails and Fax Messages
- Managing Voicemail
- Notification Service for Messages
- How to Define an Additional Phone Number

10.1.1 How to Determine the Call Number for your Voicemail Box

Step by Step:

1. Click **Setup**.
2. Click on the **Personal Details** tab.
3. The call number for the voicemail box can be found in the **My Contact Details** area in the **VoiceMail Number:** field.

4. Click on **Close**, followed by **OK**.

Related Topics

- Voicemail

10.1.2 How to Select Recording or Announcement Mode

Step by Step:

1. Click **Setup**.
2. Click on the **Forwarding Destinations** tab.
3. Select one of the following values for each Presence status in the **Voicemail Recording** area:
   - If you want callers to be able to leave messages in your voicemail box, select **Active**.
   - If you want callers to only hear the announcements of your voicemail box, select **Inactive**.
4. Click **Save**.

Related Topics

- Voicemail

10.1.3 How to Record an Announcement

Step by Step:

1. Click **Setup**.
2. Click on the **Profiles** tab.
3. Click **Record**.
4. Click on the announcement with the desired designation in the list of announcements.
5. Click **Record**. The voicemail box will now call you on your phone.
6. Answer the call.
7. Speak out the text of your announcement after the tone.
8. Click **Stop**.
9. If you want to listen to the announcement on the phone, click on **Play**. To exit the playback loop, click on **Stop**.
10. If you want to record the announcement again, click on **Record**.

11. Click on **Close**, followed by **Save**.

Related Topics

- Voicemail
- How to Edit a Profile for the AutoAttendant
- How to Import an Announcement

10.1.4 How to Import an Announcement

Prerequisites:

- The audio file is available as a PCM file with the following properties: 8 kHz, 16 bit, mono.

Step by Step:

1. Click **Setup**.

2. Click on the **Profiles** tab.

3. Click **Record**.

4. Click **Upload**.

5. Click on **OK** in the **Warning!!!** window.

6. Click **OK**.

7. Click on **Close**, followed by **Save**.

Related Topics

- Voicemail
- How to Record an Announcement

10.1.5 How to Enable or Disable the Announcement of your Presence Status for External Callers

Step by Step:

1. Click **Setup**.

2. Click on the **Program Settings** tab.

3. Select one of the following options in the **Presence Visibility** area:

- If you want to activate the voicemail box announcement of your Presence status for external callers, enable the check box **My presence will be played to external callers when they reach my VoiceMail**.
- If you want to deactivate the voicemail box announcement of your Presence status for external callers, clear the check box **My presence will be played to external callers when they reach my VoiceMail**.

4. Click **Save**.

Related Topics

- Voicemail
- Presence status
- How to Change the Visibility of your Presence Status for Others
- Personal AutoAttendant
- How to Enable or Disable the Announcement of your Presence Status for Specific Callers

10.1.6 How to Enable or Disable the Announcement of your Presence Status for Specific Callers

Prerequisites:

- In order to disable the announcement of your Presence status for a specific number, this number must be transmitted with the call.

Step by Step:

1. Click **Settings**.
2. Click on the **Program Settings** tab.
3. Select one of the following options in the **VoiceMail Presence** area:
   - If you want to suppress the voicemail box announcement of your Presence status for a specific number, click **Add**, enter the desired number in the input field, and click **OK**.

     INFO: You can use the following character as placeholders to define a call number range: `?` for any single digit and `*` for any number of digits.

   - If you want to allow the voicemail box announcement of your Presence status for a specific number, click on desired entry and then on **Remove**.
4. Click **Save**.

Related Topics

- Voicemail
- Presence status
- How to Change the Visibility of your Presence Status for Others
- Personal AutoAttendant
- How to Enable or Disable the Announcement of your Presence Status for External Callers

10.1.7 How to Grant or Deny the Attendant Permission to Retrieve Voicemail and Fax Messages

Step by Step:

1. Click **Setup**.
2. Click on the **Program Settings** tab.
3. Select one of the following options in the **Security and Access** area:
   - If you want to allow your voicemail and fax messages to be retrieved by the Attendant, enable the check box **Receptionists are able to listen to my voicemail**.
   - If you want to prevent your voicemail and fax messages from being retrieved by the Attendant, clear the check box **Receptionists are able to listen to my voicemail**.
4. Click **Save**.

Related Topics

- Voicemail
- Fax Box

10.1.8 How to Activate or Deactivate the Password Prompt for the Voicemail Box

NOTICE: If you deactivate the password prompt for your voicemail box, unauthorized users could access your voicemail by phone and listen to your voice messages, for example, or call external destinations at your cost.

Step by Step:

1. Click **Setup**.
2. Click on the **Program Settings** tab.
3. Select one of the following options in the **Security and Access** area:
   - If you want to activate the password prompt on calling your voicemail box, clear the **Bypass password when calling voicemail** check box.
   - If you want to deactivate the password prompt on calling your voicemail box, enable the **Bypass password when calling voicemail** check box.
4. Click **Save**.

Related Topics

- Voicemail

10.1.9 How to Select the Language of the Voicemail Box

Step by Step:

1. Click **Setup**.
2. Click on the **Program Settings** tab.
3. Choose the language from the **VoiceMail Language** drop-down list in the **Miscellaneous** area.
4. Click **Close**.

Related Topics

- Voicemail

10.2 Managing Voicemail

You can listen to and forward voicemails, for example, or move them to another folder, save them as WAV files or call the sender.

Folders for Voicemail

myPortal organizes voice messages in the following folders:

- **Inbox**
- **Played**
- **Saved**
- **Deleted**

Displaying Voicemail

The following symbols identify different types of voicemail:

Symbol	Type of voicemail
-	Voicemail to a subscriber
	Voicemail to a group
	Recorded call
	Recorded conference

The List view of voicemails shows the following details:

- Symbol for the type of voicemail
- **Date**
- **Time**

- **Group**, if available
- **Call number**, if available
- **Last Name**, if available
  For recorded conferences: conference name, if available; otherwise, Last Name of the second conference participant, if available
- **First Name**, if available
- **Company**, if available
- **Priority**
  Color coding: urgent (rot), private (blue), normal (black). When listening to the voicemail Inbox, an announcement notifies you of the number of messages per priority.
- **Duration**

The width of all columns is variable.

Voicemail Messages for Groups

The administrator can set up groups for voice messages with a separate call number for each group. The communication system forwards voice messages to a group to each group member. As soon as one of the subscribers has listened to a new message, that message is flagged as "played" for all group members. If a group member deletes a message, that entry is also deleted for all other group members.

Listening to Voice Messages

You can optionally listen to voice messages on the phone or your PC. When a new voice message is listened to for the first time, the communication system moves it automatically from the **Inbox** folder to the **Played** folder.

Calling the Sender of a Voice Message

You can call the sender of a voice message.

Forwarding a Voice Message

You can forward a voice message easily to other internal subscribers.

Moving a Voice Message

You can move a voice message to another folder.

Saving a Voice Message as a File

> ***NOTICE:*** The communication system saves voice messages for a limited period of time, which can be configured per folder by the administrator. When this time period expires, the voice messages are automatically deleted by the communication system.

You can save a voice messages as a WAV file in the file system of your PC to archive it permanently or send it to any recipient by e-mail.

Related Topics

- Voice Messages and Fax
- How to Listen to a Voice Message on the Phone
- How to Listen to a Voice Message on the PC
- How to Call the Sender of a Voice Message
- How to Forward a Voicemail Message
- How to Move a Voice Message
- How to Save a Voice Message as a WAV File
- How to Sort Voice Messages
- How to Delete a Voice Message
- User Interface Elements
- Voicemail

10.2.1 How to Listen to a Voice Message on the Phone

Prerequisites:

- Your Presence status is **Office** or **CallMe**.

Step by Step:

1. Click on the **VoiceMail** tab.
2. Click on the desired folder, e.g., **Inbox**.
3. Click on the desired voicemail.
4. Click on **Play Message > Through Phone** in the context menu.

Next steps: Answer the call.

Related Topics

- Managing Voicemail
- How to Listen to a Voice Message on the PC

10.2.2 How to Listen to a Voice Message on the PC

Prerequisites:

- Your PC has a properly configured sound card with speakers or headphones.

Step by Step:

1. Click on the **VoiceMail** tab.
2. Click on the desired folder, e.g., **Inbox**.
3. Click on the desired voicemail.
4. Click on **Play Message > Through Speakers** in the context menu.

5. Click on the **Play** button in the screen pop.

Related Topics

- Managing Voicemail
- How to Listen to a Voice Message on the Phone

10.2.3 How to Call the Sender of a Voice Message

Step by Step:

1. Click on the **VoiceMail** tab.
2. Click on the desired folder, e.g., **Played**.
3. Click on the desired voicemail.
4. Click in the context menu on the item **Dial ...** with the appropriate phone number.

Related Topics

- Managing Voicemail

10.2.4 How to Forward a Voicemail Message

Step by Step:

1. Click on the **VoiceMail** tab.
2. Click on the desired folder, e.g., **Played**.
3. Click on the desired voicemail.
4. Click on **Forward Message**, in the context menu.
5. Click on the desired station and then on **Forward**.

Related Topics

- Managing Voicemail

10.2.5 How to Move a Voice Message

Step by Step:

1. Click on the **VoiceMail** tab.
2. Click on the desired folder, e.g., **Played**.
3. Click on the desired voicemail.
4. Select the desired folder in the context menu under **Move Message to > …**.

Related Topics

- Managing Voicemail

10.2.6 How to Save a Voice Message as a WAV File

Step by Step:

1. Click on the **VoiceMail** tab.
2. Click on the desired folder, e.g., **Played**.
3. Click on the desired voicemail.
4. Click on **Save as WAV** in the context menu.
5. Select a folder in the **Save** window, enter a file name of your choice in the input field, and click **Save**.

Related Topics

- Managing Voicemail

10.2.7 How to Sort Voice Messages

Step by Step:

1. Click on the **VoiceMail** tab.
2. Click on the desired folder, e.g., **Played**.
3. Click on one of the column titles: **Date**, **Time**, **Phone Number**, **Last Name**, **First Name**, **Company**, **Priority** or **Duration** to sort the voicemails by this criterion in ascending alphanumeric order.
4. If you want to reverse the sort order, click again on column header.

Related Topics

- Managing Voicemail

10.2.8 How to Delete a Voice Message

Step by Step:

1. Click on the **Voice Messages** tab.
2. Click on one of the folders: **Inbox**, **Played** or **Saved**.
3. Select one of the following options:
   - Click on the desired voicemail.
   - Mark the desired voicemails.
4. Select **Move Message to > Move to Deleted** in the context menu.
5. If you want to delete the Fax messages permanently:

a) Click on the **Deleted** folder.

b) Select the desired voice message(s).

c) Select **Move Message to > Permanently Delete Message** in the context menu.

Related Topics

- Managing Voicemail

10.3 Fax Box

The Fax box saves Fax messages centrally. You can access these messages using myPortal.

You can view or edit the following settings of your Fax box:

Determining your own Fax Number

You can determine under which Fax number you can be reached.

Retrieving Fax Messages through the Attendant

Using myAttendant, you can grant or deny the Attendant permission to access your Fax messages and voicemails. In the latter case, the Attendant can only determine how many messages you have.

Related Topics

- Voice Messages and Fax
- How to Determine your own Fax Number
- Screen Pops
- How to Enable Screen Pops for New Voicemails and Fax Messages
- How to Enable Screen Pops for New Voicemails and Fax Messages
- Managing Fax Messages
- How to Grant or Deny the Attendant Permission to Retrieve Voicemail and Fax Messages
- Sending Fax Messages
- Notification Service for Messages

10.3.1 How to Determine your own Fax Number

Prerequisites:

- Your administrator has configured a Fax number for you.

Step by Step:

1. Click **Setup**.
2. Click on the **Personal Details** tab.
3. Your Fax number can be found in the **My Contact Details** area in the **Fax Number** field.

4. Click on **Close**, followed by **OK**.

Related Topics

- Fax Box

10.4 Managing Fax Messages

You can display or forward Fax messages, for example, or move them to another folder, save them as TIFF files and even call the sender.

Folder for Fax Messages

myPortal organizes Fax messages in the following folders:

- **Inbox**
- **Read**
- **Deleted**
- **Sent Items**:
  Contains the Fax messages already sent by the communication system
- **Sending Items**
  Contains queued Fax messages that have not yet been sent The communication system tries to transmit a Fax message up to 5 times within 25 minutes.

Details of Fax Messages

Depending on the folder involved, the List view of the Fax messages shows different combinations of the following details: **Date**, **Time**, **Call number**, **Last Name**, **First Name**, **Company**, **Fax Group**, **Pages**, **Status**, **Destination** and **Progress**. The width of all columns is variable.

Fax Messages for Groups

The administrator can set up groups for Fax messages with a separate Fax number for each group. The communication system forwards Fax messages to a group to each group member. As soon as one of the subscribers has viewed a new message, the message is flagged as "read" for all group members. If a group member deletes a message, that entry is also deleted for all other group members.

Calling the Sender of a Fax Message

You can call the sender of a Fax message.

Forwarding a Fax Message

You can forward a Fax message easily to other internal subscribers.

Moving a Fax Message

You can move a Fax message to another folder.

Saving a Fax Message as a File

You can save a Fax message as a TIFF file in the file system of your PC to archive it permanently or send it by e-mail to any recipient.

Displaying Fax Messages

When a new Fax message is viewed for the first time, the communication system moves it automatically from the **Inbox** folder to the **Read** folder.

Related Topics

- Voice Messages and Fax
- How to Display a Fax Message
- How to Call the Sender of a Fax Message
- How to Forward a Fax Message
- How to Move a Fax Message
- How to Save a Fax Message as a TIFF File
- How to Sort Fax Messages
- How to Display Fax Messages in the Send Queue
- How to Display Sent Fax Messages
- How to Delete a Fax Message
- User Interface Elements
- Fax Box

10.4.1 How to Display a Fax Message

Prerequisites:

- TIFF files are associated with an application in which they can be viewed.

Step by Step:

1. Click on the **Fax Messages** tab.
2. Click on the desired folder, e.g., **Inbox**.
3. Select **View Fax** in the context menu of the appropriate Fax message.

Related Topics

- Managing Fax Messages

10.4.2 How to Call the Sender of a Fax Message

Step by Step:

1. Click on the **Fax Messages** tab.
2. Click on the desired folder, e.g., **Read**.
3. Click on the desired Fax message.

4. Click in the context menu on the item **Dial ...** with the appropriate phone number.

Related Topics

- Managing Fax Messages

10.4.3 How to Forward a Fax Message

Step by Step:

1. Click on the **Fax Messages** tab.
2. Click on the desired folder, e.g., **Read**.
3. Select **Forward Message** in the context menu of the appropriate Fax message.
4. Enable the check box for the desired recipient in the **Forward Fax Message** window and click **OK**.

Related Topics

- Managing Fax Messages

10.4.4 How to Move a Fax Message

Step by Step:

1. Click on the **Fax Messages** tab.
2. Click on the desired folder, e.g., **Read**.
3. Click on the desired Fax message.
4. Select the desired folder in the context menu under **Move Message to > …**.

Related Topics

- Managing Fax Messages

10.4.5 How to Save a Fax Message as a TIFF File

Step by Step:

1. Click on the **Fax Messages** tab.
2. Click on the desired folder, e.g., **Read**.
3. Click on the desired Fax message.
4. Click on **Save as tiff** in the context menu.

5. Select a folder in the **Save** window, enter a file name of your choice in the input field, and click **Save**.

Related Topics

- Managing Fax Messages

10.4.6 How to Sort Fax Messages

Step by Step:

1. Click on the **Fax Messages** tab.
2. Click on the desired folder, e.g., **Read**.
3. Click on one of the column titles: **Date**, **Time**, **Phone Number**, **Last Name**, **First Name**, **Company**, **Fax Group** or **Pages** to sort the Fax messages by this criterion in ascending alphanumeric order.
4. If you want to reverse the sort order, click again on column header.

Related Topics

- Managing Fax Messages

10.4.7 How to Display Fax Messages in the Send Queue

Step by Step:

1. Click on the **Fax Messages** tab.
2. Click on the **Sending Items** folder.
3. Click on one of the column titles: **Date**, **Fax Group**, **Last Name**, **First Name**, **Company**, **Destination**, **Pages** or **Progress** to sort the Fax messages by this criterion in ascending alphanumeric order.
4. If you want to reverse the sort order, click again on column header.

Related Topics

- Managing Fax Messages
- How to Display Sent Fax Messages

10.4.8 How to Display Sent Fax Messages

Step by Step:

1. Click on the **Fax Messages** tab.
2. Click on the **Sent Items** folder.
3. Click on one of the column titles: **Date**, **Fax Group**, **Pages**, **Status**, **Last Name**, **First Name**, **Company** or **Destination** to sort the Fax messages by this criterion in ascending alphanumeric order.

4. If you want to reverse the sort order, click again on column header.

Related Topics

- Managing Fax Messages
- How to Display Fax Messages in the Send Queue

10.4.9 How to Delete a Fax Message

Step by Step:

1. Click on the **Fax Messages** tab.
2. Click on one of the folders: **Inbox**, **Read**, **Sent Items** or **Sending Items**.
3. Select one of the following options:
   - Click on the desired Fax message.
   - Mark the desired Fax messages.
4. Select **Move Message to > Move to Deleted** in the context menu.
5. If you want to delete the Fax messages permanently:
   a) Click on the **Deleted** folder.
   b) Select the desired Fax message(s).
   c) Select **Move Message to > Permanently Delete Message** in the context menu.

Related Topics

- Managing Fax Messages

10.5 Sending Fax Messages

The HiPath OpenOffice Fax Printer can be used to send Fax messages under Windows.

Detains on sending Fax messages can be found in the documentation of the HiPath OpenOffice Fax Printer.

Acknowledgment on Sending a Fax Message

After a Fax message is sent, a screen pop of myPortal notifies you whether the transmission succeeded or failed.

Related Topics

- Voice Messages and Fax
- Fax Box

10.6 Notification Service for Messages

The communication system can optionally notify you about a new message by e-mail, by phone or with an SMS.

The Notification Service works as follows:

Message	Notification	Action
Voicemail,	E-mail	You receive an e-mail with the message as a WAV file, the date and time it was received, the duration of the message and, if available, the phone number and name of the sender. Voicemails with "urgent" priority are flagged as e-mails with "Importance: High".
Voicemail	by phone	Your voicemail box calls you at the number you have specified and plays back the message to you.
Voicemail	SMS	You receive an SMS about the received message at the phone number defined by you.
Fax	E-mail	You receive an e-mail with the message as a TIFF file, the date and time it was received, the number of pages and, if available, the phone number and name of the sender.

You can enable or disable every type of notification for each Presence status individually.

The notification by phone can be restricted to the business hours configured by your administrator. You can define the number and intervals for the repeated attempts for the notification by phone.

Related Topics

- Voice Messages and Fax
- How to Enable or Disable E-mail Notifications
- How to Enable or Disable the Notification by Phone
- How to Enable or Disable SMS Notification
- Voicemail
- Fax Box

10.6.1 How to Enable or Disable E-mail Notifications

Prerequisites:

- Your administrator of the communication system has configured e-mail forwarding and your e-mail address is specified under **Personal Details**.

Step by Step:

1. Click **Setup**.
2. Click on the **Notifications** tab.
3. Select one of the options below in the **Email** row of the **Notification** table for each column with one of the following Presence statuses: **Office**, **Meeting**, **Sick**, **Break**, **Out of the Office**, **Vacation**, **Lunch**, **Home** or **Do Not Disturb**:

- If you want to activate the notification for a Presence status, enable the corresponding check box.
- If you want to deactivate the notification for a Presence status, clear the corresponding check box.

4. Click **Save**.

Related Topics

- Notification Service for Messages
- How to Specify an E-Mail Address

10.6.2 How to Enable or Disable the Notification by Phone

Step by Step:

1. Click **Setup**.
2. Click on the **Notifications** tab.
3. Select one of the options below in the **Outbound** row of the **Notification** table for each column with one of the following Presence statuses: **Office**, **Meeting**, **Sick**, **Break**, **Out of the Office**, **Vacation**, **Lunch**, **Home** or **Do Not Disturb**:
   - If you want to activate the notification for a Presence status, enable the corresponding check box.
   - If you want to deactivate the notification for a Presence status, clear the corresponding check box.
4. Choose one the following options in the **Outbound Notification Times** area:
   - If you want to be notified only during business hours, click on **During Business Hours Only**.
   - If you want to be notified at any time, click on **24 Hours a Day**.
5. Enter the desired phone number in the **Outbound Number** field in dialable format or in canonical format
6. Enter the desired time interval and the number of attempts to be made when repeating the notification if required in the **Attempts** area.
7. Click **Save**.

Related Topics

- Notification Service for Messages
- Call Number Formats
- Phone Menu of the Voicemail Box

10.6.3 How to Enable or Disable SMS Notification

Prerequisites:

- Your administrator of the communication system has defined an appropriate SMS template for you.

Step by Step:

1. Click **Setup**.
2. Click on the **Notifications** tab.
3. Select one of the options below in the **SMS** row of the **Notification** table for each column with one of the following Presence statuses: **Office**, **Meeting**, **Sick**, **Break**, **SMS of the Office**, **Vacation**, **Lunch**, **Home** or **Do Not Disturb**:
   - If you want to activate the notification for a Presence status, enable the corresponding check box.
   - If you want to deactivate the notification for a Presence status, clear the corresponding check box.
4. Click **Save**.

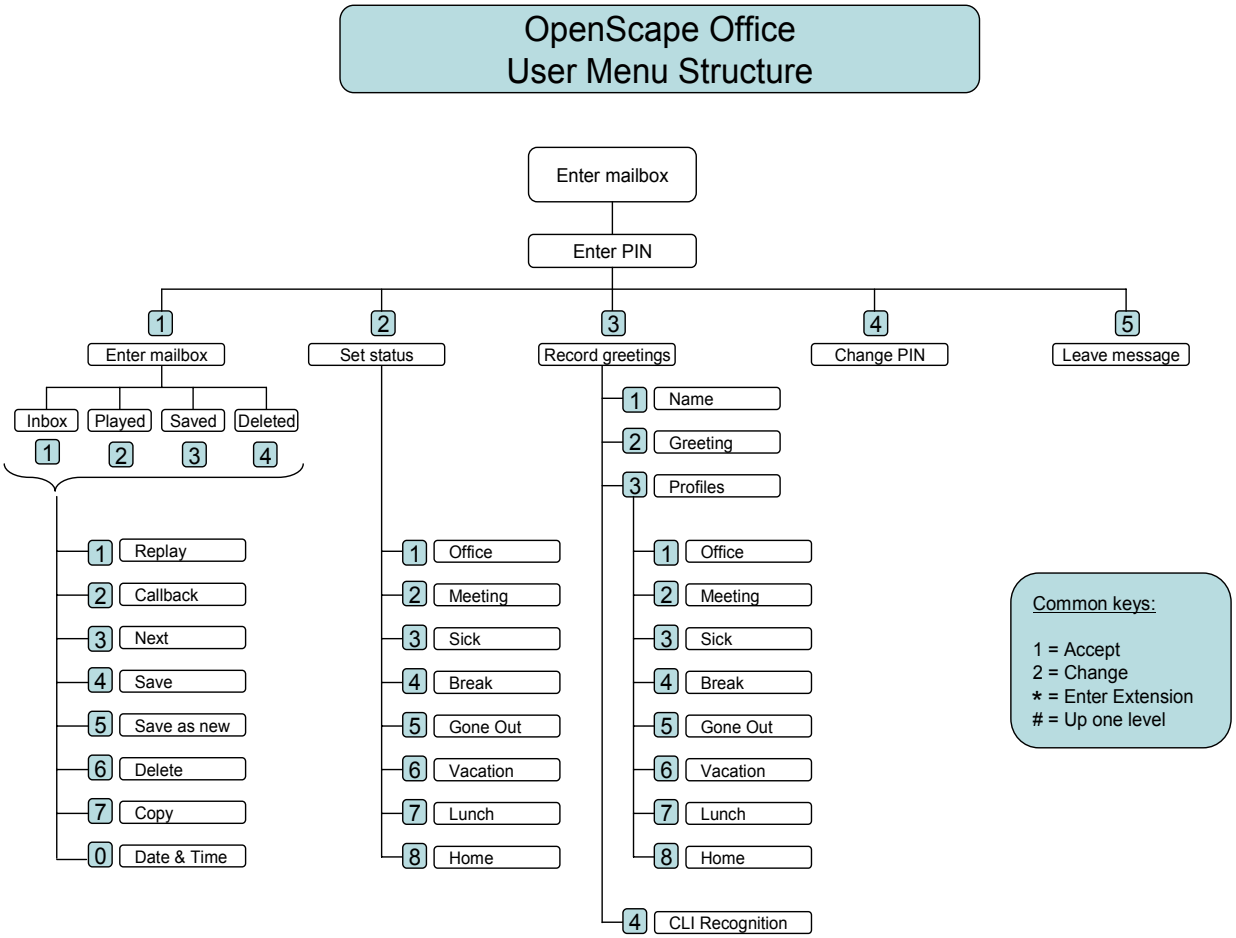
Related Topics

- Notification Service for Messages

10.7 Phone Menu of the Voicemail Box

You can edit your voicemail box or change your Presence status and also access further functions from a phone.

The password for accessing your voicemail box is the same as for myPortal.



Related Topics

- Voice Messages and Fax
- Presence status
- How to Record your Name Announcement
- How to Record your Personal Greeting
- How to Enable or Disable the Notification by Phone
- How to Change the Password

11 Configuration

You can configure myPortal to suit your requirements by editing your personal data or the program settings, for example.

> ***INFO:*** When you make multiple changes under **Setup** on different tabs, it is sufficient to **Save** all the changes once at the end.

Defining Additional Phone Numbers

Additional phone numbers are typically used for:

- Status-based call forwarding
- CallMe service

Your additional phone numbers are visible in the internal directory.

Providing your own Picture

If you provide your own picture, it will be shown to other subscribers when they position their mouse pointers over your entry in the internal directory (**Extension** column) or in the Favorites list. You can use an image of any file size. The communication system saves a copy with a width and height restricted to 200 pixels.

Automatic Logon

If you use an automatic logon, the Login window is not displayed. For security reasons, you should avoid using the automatic logon if you have shared Windows user accounts.

Related Topics

- How to Edit your own Name
- How to Specify an E-Mail Address
- How to Define an Additional Phone Number
- How to Provide your own Picture
- How to Delete your own Picture
- Programming the Function Keys of the Telephone
- How to Change the Password
- How to Enable or Disable an Automatic Logon
- How to Select the Language of the User Interface
- How to Change Skin Colors
- How to Change the Server Address
- Automatic Updates
- Troubleshooting
- Directories
- Favorites List

11.1 How to Edit your own Name

Step by Step:

1. Click **Setup**.
2. Click on the **Personal Details** tab.
3. Enter your name in the **My Personal Details** area in the **First Name** and **Last Name** fields.
4. Click **Save**.

Related Topics

- Configuration

11.2 How to Specify an E-Mail Address

Prerequisites:

- Your administrator of the communication system has configured e-mail forwarding.

Step by Step:

1. Click **Setup**.
2. Click on the **Personal Details** tab.
3. Enter your **E-mail Address** in the **My Contact Details** area.
4. Click **Save**.

Related Topics

- Configuration
- Conferencing (only HiPath OpenOffice ME)
- How to Enable or Disable E-mail Notifications

11.3 How to Define an Additional Phone Number

Step by Step:

1. Click **Setup**.
2. Click on the **Personal Details** tab.
3. Enter an additional phone number in dialable format or in canonical format in the **My Contact Details** area in one of the following fields: **Mobile Number**, **External Number 1**, **External Number 2**, **Private Number** or **Assistant Number**.

4. Click **Save**.

Related Topics

- Configuration
- Call Number Formats
- How to Enable the CallMe Service
- Status-based Call Forwarding
- How to Configure Status-based Call Forwarding
- Voicemail

11.4 How to Provide your own Picture

Prerequisites:

- You have an image file with your picture in one of the following file formats: BMP, GIF, JPG.

Step by Step:

1. Click **Setup**.
2. Click on the **Personal Details** tab.
3. Click in the **My Picture** area on **Select**.
4. Choose a folder and the desired file in the **Open** window and click **Open**.
5. Click **Save**.

Related Topics

- Configuration
- How to Delete your own Picture

11.5 How to Delete your own Picture

Step by Step:

1. Click **Setup**.
2. Click on the **Personal Details** tab.
3. Click in the **My Picture** area on **Delete**.
4. Click **Save**.

Related Topics

- Configuration
- How to Provide your own Picture

11.6 Programming the Function Keys of the Telephone

You can customize the function keys of your telephone and any available key module or BLF module with myPortal to suit your requirements.

This applies to both the predefined function keys and the other function keys, but not the local application keys (**Local App.**).

> ***INFO:*** In the case of phones with a display, you can also program some function keys directly at the phone.

Programming Function Keys on Different Levels

You can program the function keys on two levels: the first level can be assigned all the offered functions, and the second level can be assigned external phone numbers. The Shift key must be configured on the phone in order to use the second level. The LED of the function key is always assigned to the first level.

Related Topics

- Configuration
- How to Program the Function Keys of the Telephone

11.6.1 How to Program the Function Keys of the Telephone

Step by Step:

1. Click **Setup**.
2. Click on the **Personal Details** tab.
3. Click on **Program Phone Keys**. A window for programming the function keys of the telephone is opened in the Browser.
   a) If a message such as `There is a problem with the security certificate of this website` appears, click on **Continue loading this website**.
4. Under the phone icon, click on the key area that you want to edit.
5. In the detailed view of the key area, click on the key icon at end of the corresponding row. The key icon goes red and indicates that the function is active for programming.
   a) If you want to display details on the current function of a key, move the mouse pointer over the label field to the left of the key.
6. Select the desired function from the **Choose Function** drop-down list.
   a) If a function requires additional information (parameters), select these details or enter the required data.

   > ***INFO:*** Select the **Shift Key** function for a function key to access a second level where you program external phone numbers.

7. Click **Save**.
8. If you selected a system phone with automatic key labeling (such as an optiPoint 420 Standard, for example), you can enter the text that should appear in the display of the function key in the **Labeling** column.

9. If you have programmed a function key as the **Shift Key**, select the check box **2. Level**. Enter the external phone numbers as described under steps 6 to8.
10. If you want to program further function keys, repeat steps 4 to 9.
11. Close the Browser window for key programming.
12. Click in the **myPortal Setup** window on **Save**.

Related Topics

- Programming the Function Keys of the Telephone
- Problem Resolution: Empty Browser Window for Key Programming

11.7 How to Change the Password

NOTICE: For security reasons, you should change your password after logging in for the first time. Otherwise, unauthorized users could, for example, potentially access your voicemails and fax messages or redirect your station number to external toll-based destinations by simply using the default password.

INFO: You can also change the password via the Phone menu of the voicemail box.

Step by Step:

1. Click **Setup**.
2. Click on the **Personal Details** tab.
3. Click in the **My Personal Details** are under **Password** on **Reset**.
4. Enter your current password in the **Current** field.
5. Enter your new password in the **New** and **Confirm** fields. The password must not consist of only digits.

   INFO: The password applies to myPortal, myPortal for Outlook and myPortal for Outlook as well as phone access to your voicemail.

6. Click on **OK**, followed by **Save**.

Related Topics

- Configuration
- How to Start myPortal
- Phone Menu of the Voicemail Box

11.8 How to Enable or Disable an Automatic Logon

NOTICE: Use the automatic login only if you are sure that no one else has access to your Windows user account. Otherwise, unauthorized users could, for example, potentially access your voicemails and fax messages or redirect your station number to external toll-based destinations.

Step by Step:

1. Click **Setup**.
2. Click on the **Program Settings** tab.
3. Select one of the following options in the **Security and Access** area:
   - If you want to enable the automatic logon, select the check box **Remember my password and automatically log me into myPortal**.
   - If you want to disable the automatic logon, clear the check box **Remember my password and automatically log me into myPortal**.
4. Click **Save**.

Related Topics

- Configuration
- How to Start myPortal

11.9 How to Select the Language of the User Interface

Step by Step:

1. Click **Setup**.
2. Click on the **Program Settings** tab.
3. Choose the **Language** in the **Miscellaneous** area.
4. Click **Save**.

Next steps: Close myPortal and restart the application.

Related Topics

- Configuration
- User Interface Elements

11.10 How to Change Skin Colors

Step by Step:

1. Click **Setup**.
2. Click on the **Program Settings** tab.
3. Select the option with the desired appearance in the **Skin** area.

4. Click **Save**.

Next steps: Close myPortal and restart the application.

Related Topics

- Configuration
- User Interface Elements

11.11 How to Change the Server Address

INFO: Do not change the server address unless you are instructed to do so by your administrator. You cannot use myPortal with an invalid server address.

Step by Step:

1. Click **Setup**.
2. Click on the **Program Settings** tab.
3. Enter the IP address of the communication system in the **Server Address** field in the **Security and Access** area.
4. Click **Save**.

Related Topics

- Configuration

11.12 Automatic Updates

Automatic updates ensure that myPortal is always kept up-to-date with the latest version.

If myPortal detects that a new version of myPortal is available on the communication system at startup, you will receive a corresponding message and can then update myPortal.

Related Topics

- Configuration
- How to Perform Automatic Updates

11.12.1 How to Perform Automatic Updates

Prerequisites:

- You have received a message such as: `A new version of myPortal is available and will be downloaded shortly. myPortal will be automatically closed and restarted.`

Step by Step:

1. Click **OK**.

Next steps: myPortal is automatically closed and updated. You can then restart myPortal.

Related Topics

- Automatic Updates
- Problem Resolution: No Automatic Update

11.13 Troubleshooting

Help on known issues can be found under *Troubleshooting*.

Related Topics

- Configuration
- Problem Resolution: No Connection to the Communication System
- Problem Resolution: The Nokia Application Suite Starts Instead of myPortal
- Problem Resolution: Empty Browser Window for Key Programming
- Problem Resolution: No Automatic Update

11.13.1 Problem Resolution: No Connection to the Communication System

The Windows/Vista Personal Firewall is enabled by default on installing Windows. The firewall prevents the connection of your application with the communication system. Contact your network administrator or your administrator of the communication system to have the following steps performed:

Step by Step:

1. Add the application to the list of exceptions in the Windows Firewall settings in the Control Panel.

Related Topics

- Troubleshooting
- How to Start myPortal

11.13.2 Problem Resolution: The Nokia Application Suite Starts Instead of myPortal

If the Nokia Application Suite is installed on your PC, Java applications with the .jar extension such as myPortal, for example, are automatically associated with that application. Note that the Nokia Application Suite will automatically become the default application for .jar files when it is reinstalled. Contact the administrator of your network to have the following steps performed:

Step by Step:

1. Reinstall the Java Runtime Software on the PC involved.

Related Topics

- Troubleshooting
- How to Start myPortal

11.13.3 Problem Resolution: Empty Browser Window for Key Programming

On clicking the **Program Phone Keys** link, your Browser opens with only an empty window.

Step by Step:

1. Disable the proxy server temporarily in the Connection settings of your Browser.
2. Refresh the page for programming function keys in your Browser and complete the key programming.

Next steps: Then reactivate the proxy server in your browser.

Related Topics

- Troubleshooting
- How to Program the Function Keys of the Telephone

11.13.4 Problem Resolution: No Automatic Update

The automatic update is not executed correctly. This could be because your Windows user account does not have local administration rights. Contact your network administrator to have the following steps performed:

Step by Step:

1. Make sure that the user has local administration rights.

Related Topics

- Troubleshooting
- How to Perform Automatic Updates

Index

A

Absence 43
  automatic creation of Outlook appointments 43
Ad-hoc Conference 61
Ad-hoc conference 64
alternative workplace 50
announcement 80
announcement mode 80
authentication
  conference participant 61
AutoAttendant
  central 80
  personal 57, 80
automatic logon 103
automatic updates 103
availability 42

B

Break 43

C

call
  accept 21
  exit 39
  forward to voicemail box 42
  hold 39
  Journal, accepted 32
  Journal, external 32
  Journal, inbound 32
  Journal, internal 32
  Journal, missed 32
  Journal, open 32
  Journal, outgoing 32
  pick up for another subscriber 21
  record 39
  transfer 39
call forwarding
  rule-based 52
  status-based 52
Call Functions 21
call number format 20
call sender
  Fax message 94
  voicemail 88
callback
  Journal 32
  Phone menu 101
CallMe 43, 50
CallMe service 50
canonical format 20
color
  user interface 103
Concept 8
condition
  rule-based call forwarding 52
Conference 61
conference
  record 39
configuration 103
Contact 23, 28
controlling availability 42

D

dialable format 20
dial-in number
  conference 61
Directory 23
directory
  make call 21
Display Conventions 8
Do Not Disturb 43
Dynamic greetings 57

E

e-mail
  invitation to conference 61
  notification 99
  specify address 103
exception
  rule-based call forwarding 52
external directory 23

F

Favorites List 28
Favorites list
  make call 21
Fax 80
Fax Box 93
Fax message
  delete 94
  display 94
  forward 94
  group 94
  move 94
  retrieve through attendant 80, 93

send 98
Fax number 93
First Steps 14
folder
Fax messages 94
Journal 32
voicemail 88
function keys
program 103
functions
during a call 39
myPortal 7

G

general personal greeting 80
group
voicemail 88

H

Home 43

I

importing Outlook contacts 23
Installation 11
Instant Message 79
internal directory 23
Introduction 7
invitation
conference 61

J

Journal 32
grouping entries 32
make call 21

K

key programming 106

L

language
user interface 103
voicemail box 80
Lunch 43

M

make call 20
Meeting 43
myPortal
functions 7

N

name
change 103
Name announcement 14
name announcement 57, 80
Notification
Fax message 99
voicemail 99
notification by phone 99
Notification service 99

O

Office 43
OpenScape Office, hardware and software prerequisites 12
Operating instructions 8
Out of the Office 43
Outlook contact
import 23

P

password
change 103
Phone menu 101
voicemail box 80
permanent conference 61, 76
personal announcement 57
personal AutoAttendant 57
personal contact 23
personal details 103
personal directory 23
personal greeting 14, 80
Phone menu 101
phone number
additional 103
dial 21
voicemail box 80
picture
delete 103
provide 103
Presence status 43, 57
announcements 80
automatic reset 43
automatic updating of Outlook appointments 43
call forwarding 52
Phone menu 101
screen pops 43
visibility 43
Priority 88, 99
private voicemail 88
profile for personal AutoAttendant 57
program settings 103

R

recording mode 80
Rule 52

rule-based call forwarding 52

S

Scheduled Conference 69
scheduled conference 61
screen pop, pop-up window 35
searching in a directory 23
sent Fax messages 94
server address 103
Setup 103
Sick 43
skin color 103
SMS
    notification 99
sorting
    directory 23
    Fax messages 94
    Journal 32
    voicemail 88
starting myPortal 11
status-based call forwarding 52

T

teleworking 50
TIFF file
    Fax message 94
    notification 99
topics, types of 8
transfer method 39
Troubleshooting 110
Types of Topics 8

U

uninstallation 11
urgent voicemail 88
user interface
    color 103
    elements 9
    language 103
User Interface Elements 9
user-defined profile, custom profile 57

V

Vacation 43
virtual conference room 61
Voicemail 80
voicemail
    delete 88
    forward 88
    listen to 88
    move 88
    private 88
    urgent 88
voicemail box 57
    Phone menu 101

W

WAV file
    notification 99
    voicemail 88

Z

zoom function 23